GETTING STARTED WITH THE ESF 8 PORTAL

VERSION 2013-1

MARCH 28, 2013

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SECTION 1: INTRODUCTION

Welcome!

As a new user to the ESF 8 Portal, we want to extend a welcome and a commitment to you that your user experience and satisfaction with the applications are very important to us.

We are constantly looking for ways to improve, and if you encounter any problems or errors, or if you have suggestions for improvement, we want to hear about them. You can contact us in several ways:

1. The "Contact Us" button in the upper right hand portion of each application has instructions and live links to email or phone us.
2. You can always send an email to Henry Yennie, the application manager, at henry.yennie@la.gov
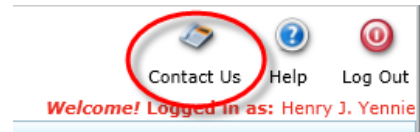
We are constantly adding to our library of help documents and webinars, in addition to improving the help in each application. You can get started by going to the following site and downloading some content:

<div align="center">

ESF 8 Portal Documentation and Webinars

</div>

You can view content from this site or you can download it for review later. Some of the material in the documents will be included in this document, so some of it may look familiar. A good comprehensive document is the "MasterGuide-2013-v1" document.

This document contains valuable tips on what types of Position Titles need to be associated with Persons at your facility, how to ensure that each Person has the right contact information, and others.

As a new user, please pay particular attention to the sections that deal with your account and contact information. It is important to get this information correct so that you can be certain to receive the notifications targeted for you.

Please do not hesitate to ask for help or training. Our goal is to make sure that these applications allow you to do your business in the most efficient manner possible.

Accessing the Portal

You can access the portal at https://esf8.dhh.la.gov/esf8portal. You can also access it through the DHH main page (www.dhh.la.gov) and the LHA main page (www.lhaonline.org).

We recommend that you use the DHH site as the starting point as that link will always be current.
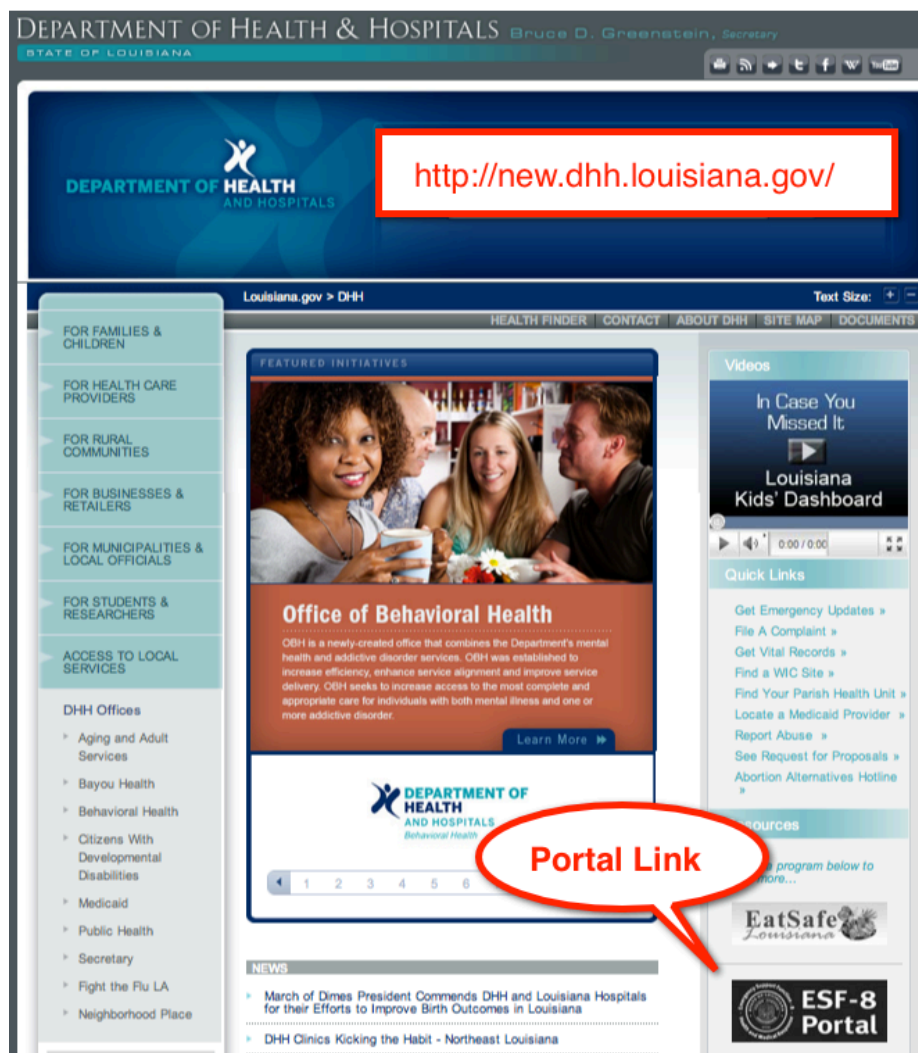
Terms of Use

The terms of use are simple:

1. Don't use the production site to "play in". The production site is meant for real data and real events and significant drills. If you want to practice sending messages, creating events, etc., use the QA site at https://esf8qa.dhh.la.gov/esf8portal. Contact us for information about accessing this training site.

2. Be respectful of others and use discretion with the Messaging tools. The Messaging module is a very powerful tool, and it should be used with forethought. The primary caution is to use any telephone delivery method with care. Make sure that the use of this delivery method is appropriate to the situation.

    a. For example, if there is a legitimate emergency that requires immediate attention by a group of contacts, use all delivery methods. The criticality of the situation must demand that you reach your contacts by any means available.
    b. On the other hand, sending out a notification about a drill or other non-critical event generally does not warrant the use of telephone delivery methods. For these types of notifications we recommend the use of the Business Email and the Business Text Message methods.

3. Use common sense in messaging language. Don't use obscenity or other language that may be offensive to the common person. Be succinct and to the point. Always precede notifications and updates associated with a drill or an exercise with the phrase: THIS IS A DRILL or THIS IS AN EXERCISE. People are inundated with communications in today's business environment, and we should take care to make sure our messages are brief and clear.
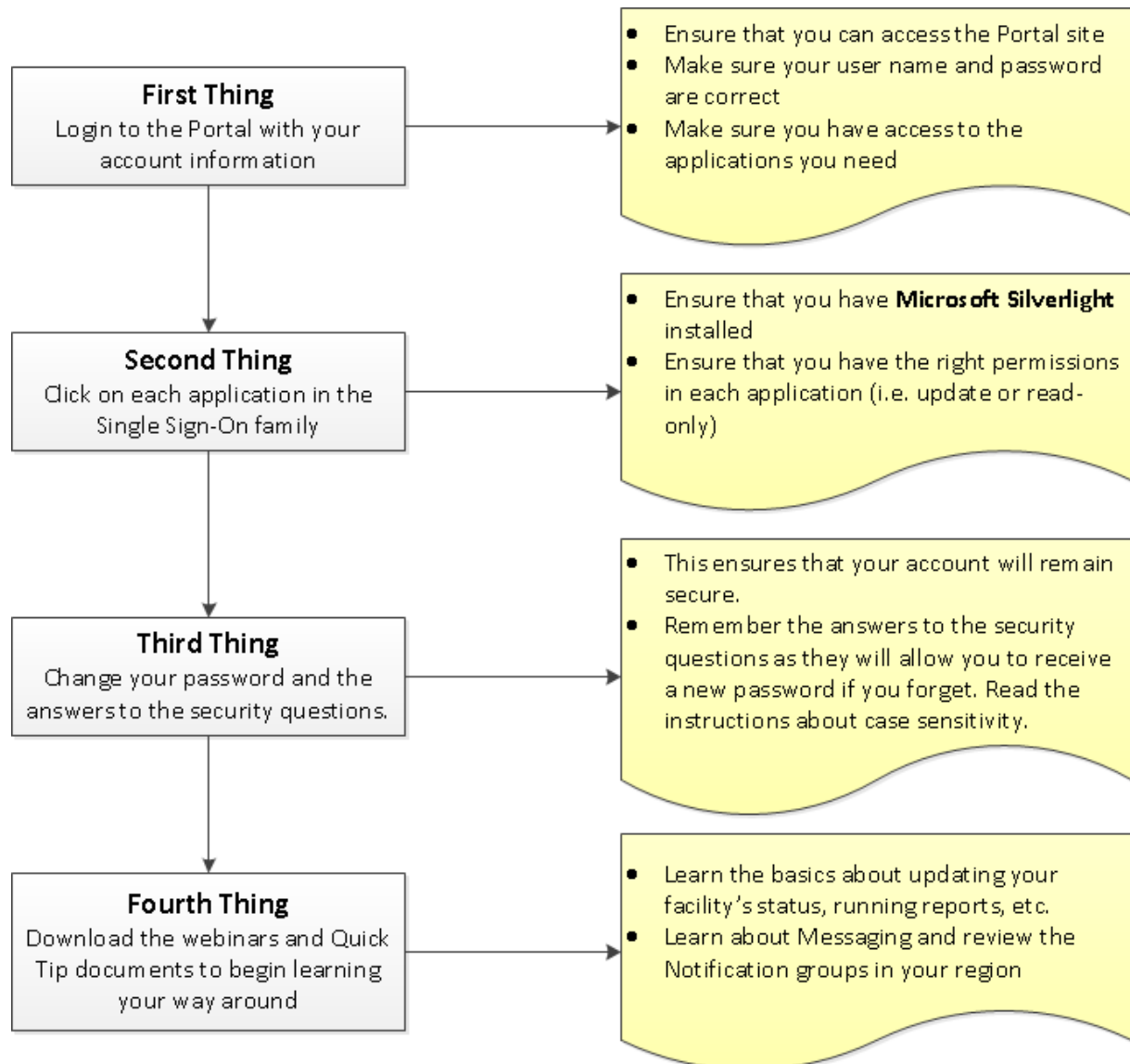
4. The bed and service availability information on the web site should be used with caution. This is particularly true with the data displayed on the LERN dashboards. If you are in a region that participates in the LERN protocols, you should follow the protocol. This means avoiding "self-routing" based on the dashboard.

    Remember that the LERN Communications Center often has access to information not displayed on the dashboard, particularly in other regions that you may not be able to see. Misuse of this capability could be grounds for removing your access to the system.

As the system matures, you may see an expanded "terms of use" on the login page.

First Things First

Here's a quick flow chart outlining the major first steps you should take upon receiving your user account information:

First Thing
Login to the Portal with your account information

- Ensure that you can access the Portal site
- Make sure your user name and password are correct
- Make sure you have access to the applications you need

Second Thing
Click on each application in the Single Sign-On family

- Ensure that you have **Microsoft Silverlight** installed
- Ensure that you have the right permissions in each application (i.e. update or read-only)

Third Thing
Change your password and the answers to the security questions.

- This ensures that your account will remain secure.
- Remember the answers to the security questions as they will allow you to receive a new password if you forget. Read the instructions about case sensitivity.

Fourth Thing
Download the webinars and Quick Tip documents to begin learning your way around

- Learn the basics about updating your facility's status, running reports, etc.
- Learn about Messaging and review the Notification groups in your region

Managing Your User Account

When originally created, your user account has three important components:

1. Your user name
2. Your initial password
3. Your security questions

If you forget your password, you have two options on the login screen:

1. You can answer your security questions and establish a new password, or
2. You can answer your security questions and have a new password emailed to you

These options are available under the login area:

If you can't remember your user name or your security question answers, call the LERN Communications Center at 866-320-8293. They may be able to assist. However, please note that LERN cannot "see" your current password. They can only reset it.

Managing Your Contact Information

Besides following the "first steps" outlined earlier, we recommend that you read the following quick tip.

When you log in to the ESF 8 Portal, you have a tab called "My Profile". This is the place where you can maintain your contact information and ensure that you get all the notifications and alerts targeted for you.

In the "My Profile" section you can add phones, email addresses and physical addresses if you want.

In the My Profile section, click the "+" button to expand the section and Add phone numbers and email addresses.

Add as many phone numbers and email addresses as needed. This is to ensure that you will receive all notifications targeted to you regardless of the delivery method chosen in the Notification setup.

Adding a phone number or email address is simple. Click the appropriate "Add" button and enter your information. You can then select the Type.

Here are some tips about types of phone numbers, particularly cell phones:

1. If you have one cell phone that you use for both business and personal calls/texts, add the phone number at least twice, maybe four times. Add the number as follows:
   a. Business Cell
   b. Business TextMsg
   c. Cell (for personal cells)
   d. Personal TextMsg
2. If you follow this suggestion, you will ensure that you will receive any text message regardless of the method selected by the sender.

New Phone:

✓ Select type   Save   Cancel
Home
Work
Cell
WorkFax
HomeFax
Pager
Other
Primary
BusinessCell
BusinessTextMsg
PersonalTextMsg
TextDeviceUnlimited

Add New Phone

My Emails

My Addresses

rtment of Health & Hospitals | State of Louis
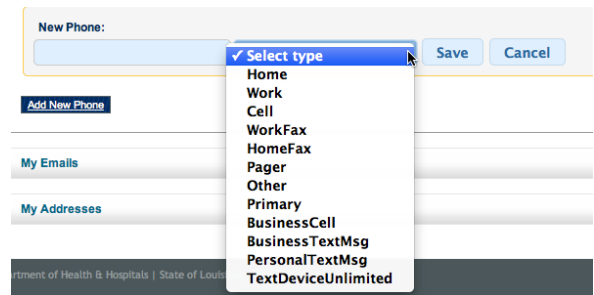
Why is this necessary? We did not want to assume that every cell phone also receives texts. We had sufficient feedback from users who didn't want to receive texts, whose devices were not activated for texting, or who were still being charged a per-text fee.

Role of the Facility Point of Contact

Each facility and agency has a designated Facility Point of Contact.

1. The Facility Point of Contact gives us one person with which to communicate, and it also allows us to extend some functionality down to the facility level. This functionality includes the ability to maintain contact information for staff in the facility and to create and manage user accounts for that facility.

2. They can also re-set forgotten passwords and look-up forgotten user IDs. While this isn't required, it would be very helpful and time-saving, giving your facility more control over who does what with these systems.

3. Most Tier 1 hospitals also have a LERN Point of Contact. In many facilities, the person (or position) that updates the LERN data is different than the person or position that updates the EMSTAT and/or Resource Management systems. If they are the same person in your facility, they can remain in those roles.

Getting Help

There are several ways to get help if you run into a problem with your account, need some help with a particular function such as updating your facility's status, or encounter an error that stops you from doing your work.

Generally, if you have a user account problem or need some help with a common application function, you should reach out to your Facility Point of Contact first.

If they can't help or are unavailable, your region's Designated Regional Coordinator (DRC) may also be able to help.

Finally, you can call the LERN Communications Center for assistance. If you have encountered an application error that prevents you from doing your work, you should call the LERN Communications Center first as they have access to more advanced technical support.
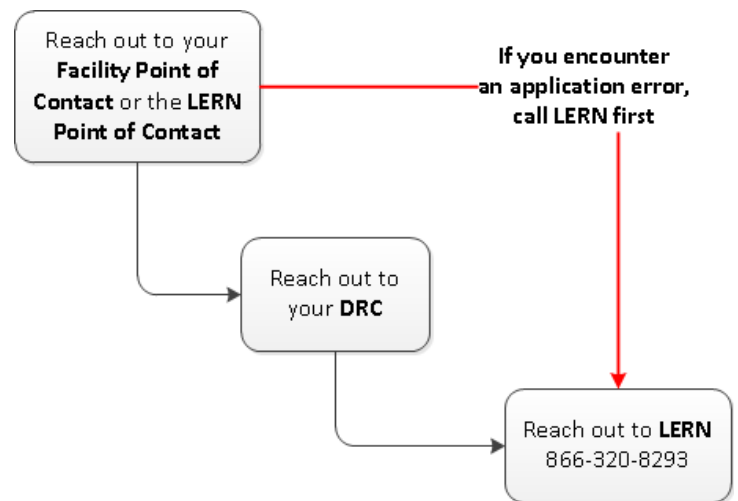
You also have a new option on the ESF 8 Portal login page – something called "Glance". Glance is a new support technology that allows ESF 8, LERN, or your DRC to quickly start a screen sharing session and even view your screen when you are experiencing a problem.

Glance allows ESF 8 to do 3 primary things:
1. Show our screen to you and up to 100 people on an ad hoc basis. No software installation is required.
2. View your screen if needed. This requires the quick installation of a Glance plug-in.
3. Take control of your mouse to show you how to do something. This is possible once you have the Glance plug-in installed.

If you need support and some sort of screen sharing is required we will start a Glance session and give you a session key (a 4-digit number). You'll enter that number in the space provided and then click the Glance button. That's all it takes! The following screen shots will show you how this is done.

Viewing the Screen of an ESF 8 Support Staff Member

If you need to see our screen, we will start a Glance session. Glance can be accessed on the ESF 8 Portal login screen as shown below:

- Once you enter the session key and click the Glance button, after a brief moment you will see the support staff's screen:
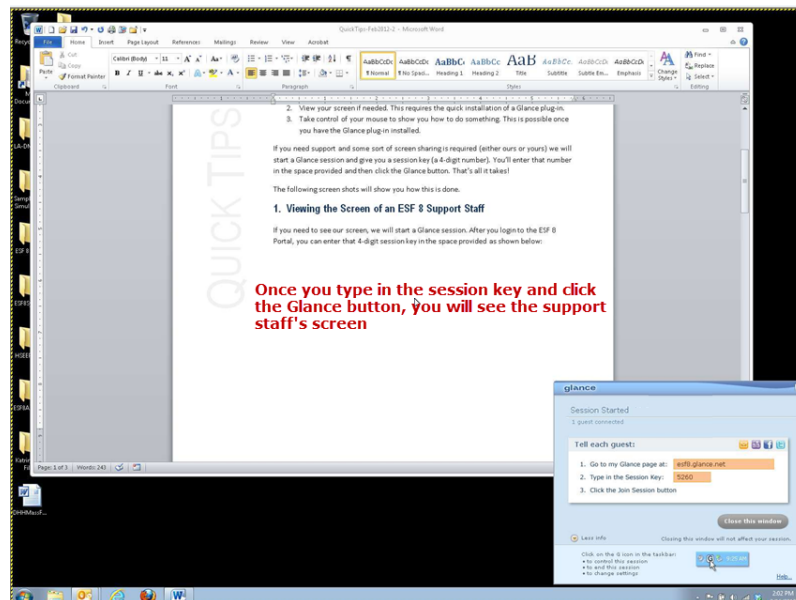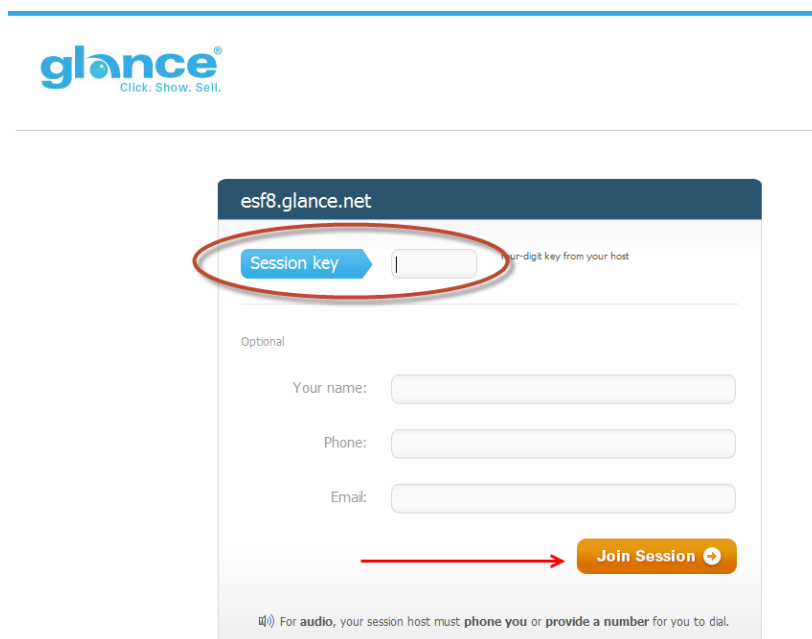
- It's that simple! Your host can close the session and you will be given a message to that effect.

- If you can't access the Portal login screen, we can still access Glance as a support tool. If needed, you would be directed to the following web address: **esf8.glance.ned. We may also send you an email with this address and the session key embedded**:
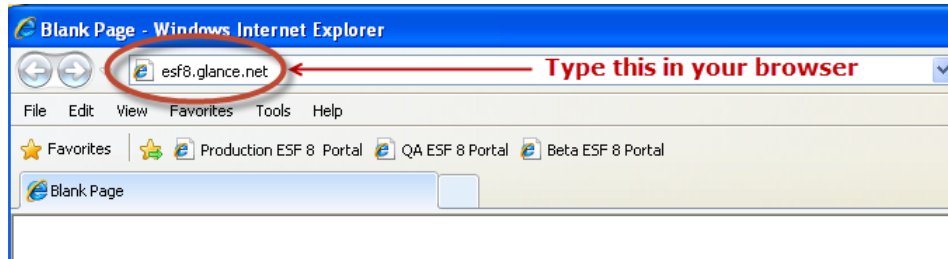
You will be brought to the following page where you can enter the session key and click "Join Session":

As before, once you enter the session key and click the "Join Session" button, you will see the support staff's screen after a brief moment.

Viewing Your Screen

- In order for the support staff to see your screen, you will start the session as outlined above by entering the session key and clicking the Glance button. You will then be asked to install a small plugin:
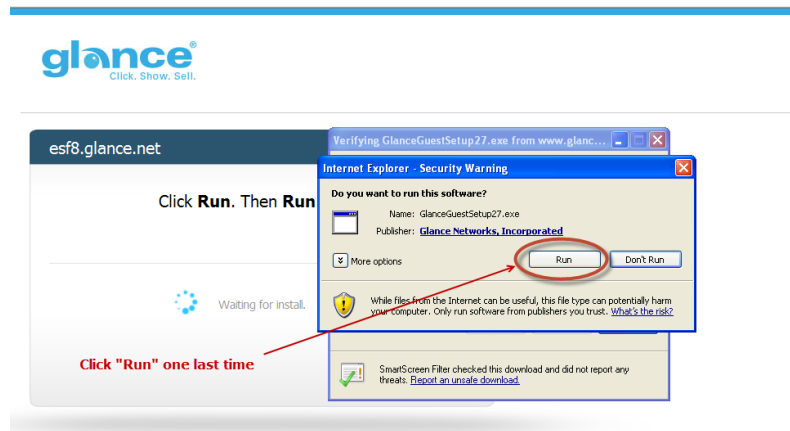
- Once this is complete, you will be asked to click "Run" again:
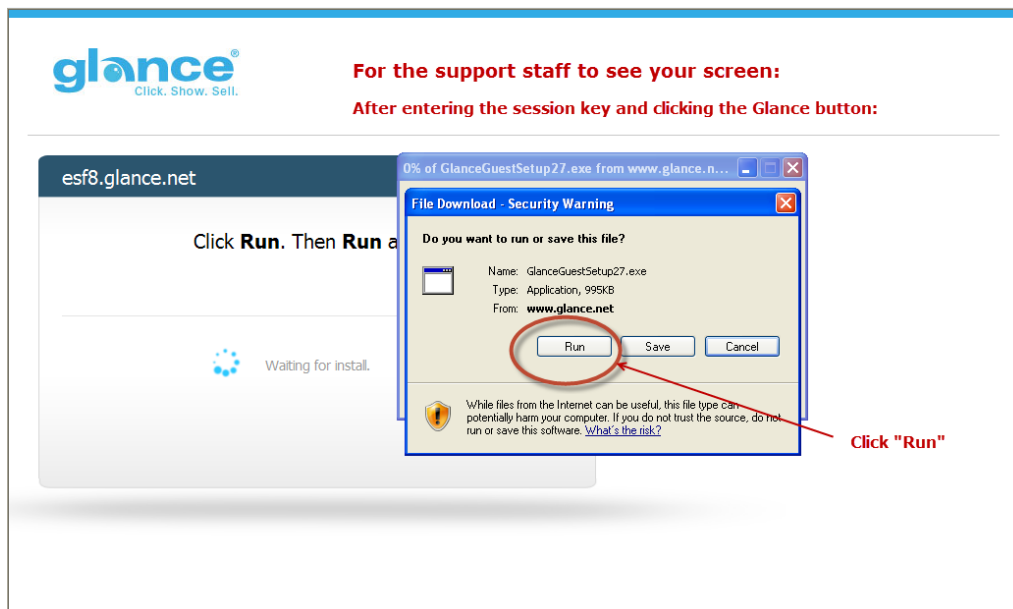
- Once this process is complete, you will be asked to let the ESF 8 support staff see your screen by clicking "Allow":
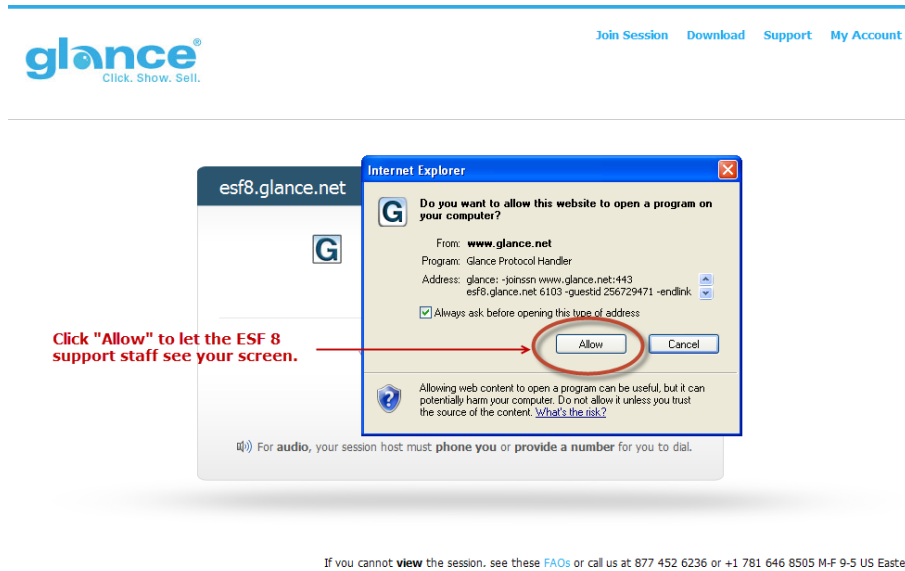
- Click "Allow" once more to confirm:
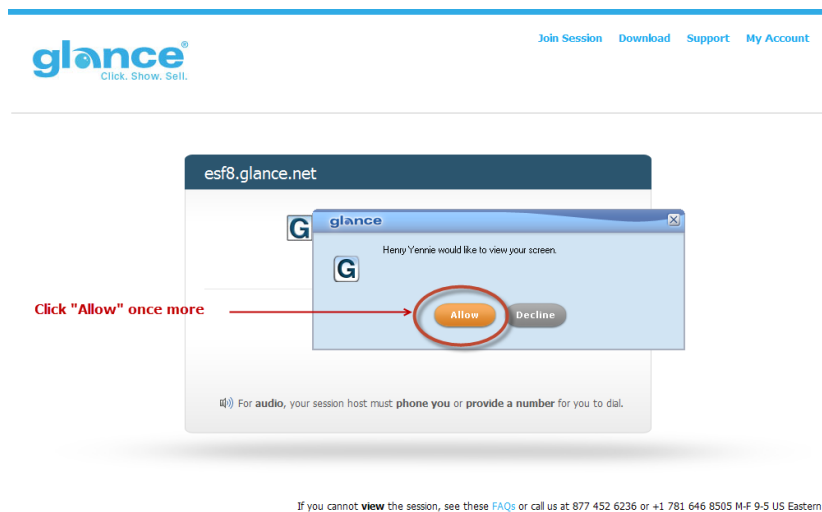
- Once this is done, you will get a window near the bottom right of your screen showing you the options you have during the session and highlighting the small "G" icon in your task tray:

452 6236 or +1 781 646 8505 M-F 9-5 US Eastern.

glance   ⊠

Henry Yennie can now see (but not control) your screen.

For more options, click the **G** icon near your clock.

Leave Session   **Close Window**

glance
Hide my screen
Stop remote control
Leave session
Settings...
                                        G 9:25 AM
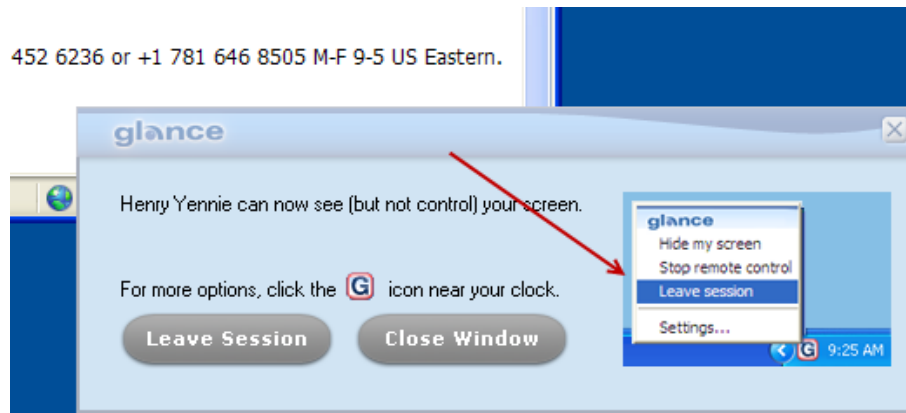
- The "G" icon in your tray gives you options:

100%

Clicking on the "G" will give you options
to end the session or allow the ESF 8
staff to control your mouse.

↓

G   2:06 PM
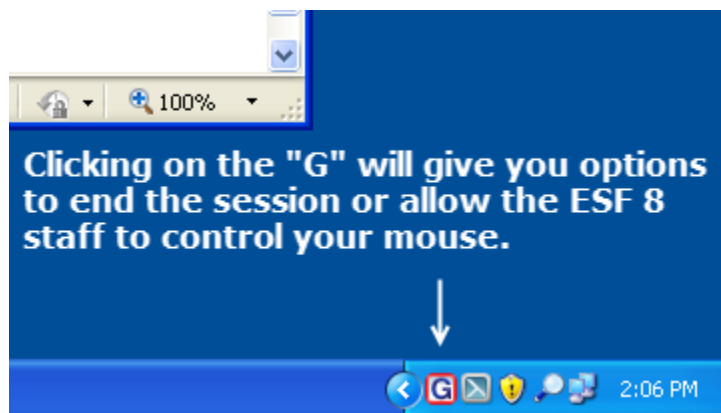
Allowing Remote Control of Your Mouse

- If you want to give the support staff control of your mouse, click the "G" icon in your tray and choose "Allow Remote Control":
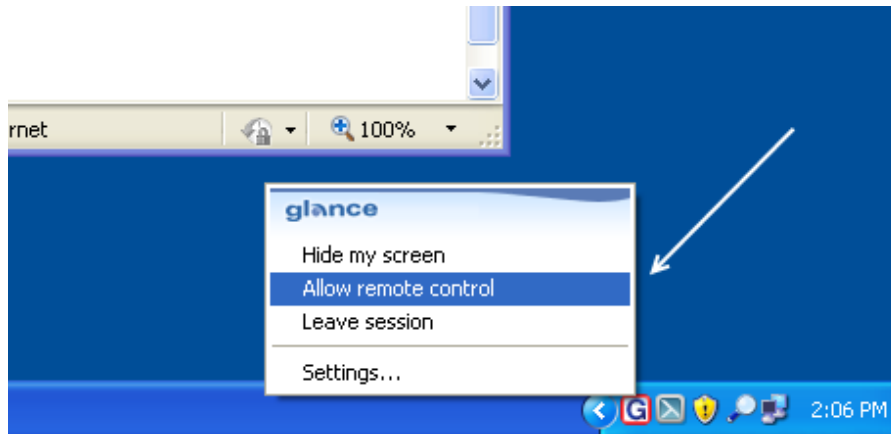
- This will bring up a confirmation screen. Click "Allow" once more:
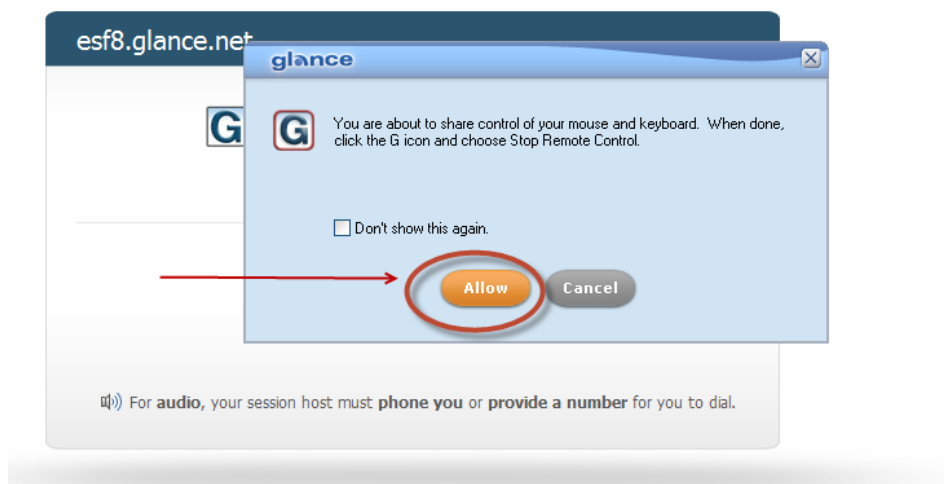
Support staff can now give you instructions directly on your machine or discover the errors you are experiencing quickly and efficiently.

- During the session, the "G" icon gives you options:
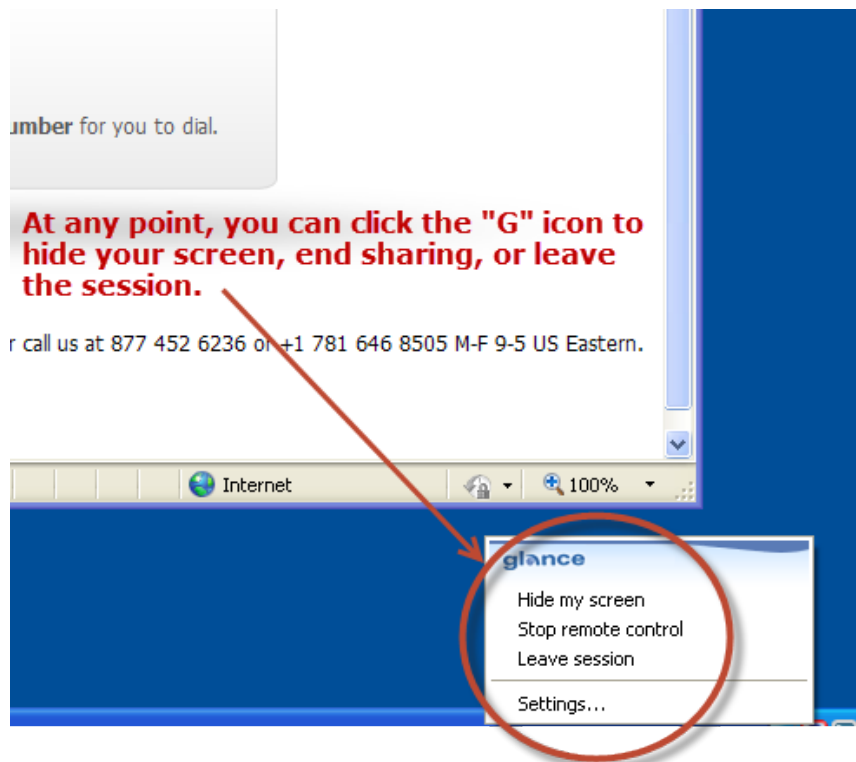
- When the session ends, you can leave the Glance software installed to make future sessions more seamless, or you can have it remove itself.

- In any scenario, when the host ends the session, you will get a notification similar to that below:
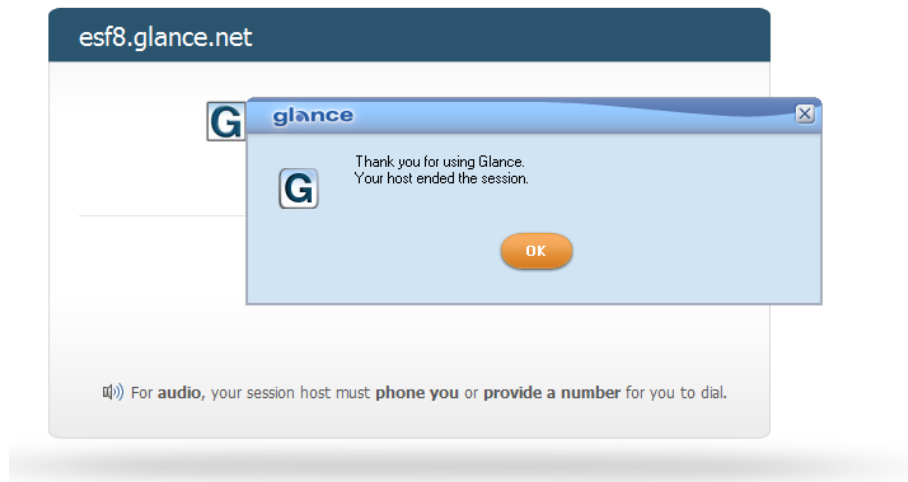
All ESF 8 support staff, including LERN, has access to Glance.

Common Questions

The following section lists some answers to some common questions received since the Production system went live in November 2011:

1. **Do I have to install new software?**

   a. Yes. In order to use these new systems, you will have to install the Microsoft Silverlight™ plug-in for Internet Explorer or any other browser your facility uses. This is a quick and painless process that only has to occur once. Because this is a common plug-in used by new web sites, you may already have it installed. Even if your computers are managed systems that don't allow you to install software, you can often install this plug-in without the intervention of your IT staff. If you do have managed computers, it is recommended that you inform your IT staff. They can contact us if they have any questions. We can be reached at henry.yennie@la.gov or support@comtecinfo.com.

   b. You do not have to change your browser. If your hospital or agency still uses an older version of Internet Explorer, you can access these systems with no issues. However, a benefit of upgrading to the current version of Internet Explorer (at least version 9) is that the applications make use of the Tab feature. Instead of opening new browser windows, it opens new views in tabs. But this upgrade is not required.

2. **Will these new systems replace EMSTAT?**

   a. No. You will continue to use EMSTAT to report your status during a declared event. The new EMSTAT will be available for the 2013 hurricane season.

   b. The Bed Poll is the same as the census report in EMSTAT. This data connection is live, so that a report done in one application appears in the other application. This means that you can be in compliance with a disaster-related reporting rule by completing a census report in either application.

3. **Will I continue to update my ED status and/or my LERN status in EMResource™?**

   a. No. EMResource™ is no longer available.

4. **Has my EMSTAT password changed?**

   a. The new EMSTAT will be incorporated into the Single Sign-On system before the 2013 hurricane season. You will not need to login again to access EMSTAT.

SECTION 2: MESSAGING

Making Sure You Get the Message with Contact Information

With the start of the New Year, we thought we would repeat a Quick Tip from last year. The suggestions outlined in Tip #1 are important as it impacts how you get critical messages from ESF 8 and other facilities and regions.

When you log in to the ESF 8 Portal, you have a tab called "My Profile". This is the place where you can maintain your contact information and ensure that you get all the notifications and alerts targeted for you.

In the "My Profile" section you can add phones, email addresses and physical addresses if you want.

In the My Profile section, click the "+" button to expand the section and Add phone numbers and email addresses.

Add as many phone numbers and email addresses as needed. This is to ensure that you will receive all notifications targeted to you regardless of the delivery method chosen in the Notification setup.

Adding a phone number or email address is simple. Click the appropriate "Add" button and enter your information. You can then select the Type.

Here are some tips about types of phone numbers, particularly cell phones:

3. If you have one cell phone that you use for both business and personal calls/texts, add the phone number at least twice, maybe four times. Add the number as follows:

    a. Business Cell
    b. Business TextMsg
    c. Cell (for personal cells)
    d. Personal TextMsg

4. If you follow this suggestion, you will ensure that you will receive any text message regardless of the method selected by the sender.

Why is this necessary? We did not want to assume that every cell phone also receives texts. We had sufficient feedback from users who didn't want to receive texts, whose devices were not activated for texting, or who were still being charged a per-text fee.

Here is a mapping table showing contact types in My Profile and their match in Notification Delivery Methods:

Contact Types in My Profile (Security)		Delivery Methods (Notification)
	↔	
PHONE TYPES		
Home	↔	Home Phone
Work	↔	Business Phone
Cell	↔	Personal Cell
WorkFax	≫→	--
HomeFax	≫→	--
Pager	≫→	--
Other	≫→	--
Primary	≫→	--
BusinessCell	↔	Business Cell
Business TextMsg	↔	Business Cell Text
PersonalTextMsg	↔	Personal Cell Text
TextDeviceUnlimited	↔	SMTP Text
EMAIL TYPES		
Work	↔	Business Email
Home	↔	Home Email

Please note that the contact types in grey can be stored in your profile, but they cannot be used as delivery methods in the Notification system.

The process for creating groups for messaging has been re-designed, giving the user much more flexibility and power in creating new groups.

1. To start, in the Messaging Module, click on Admin → Manage Groups:
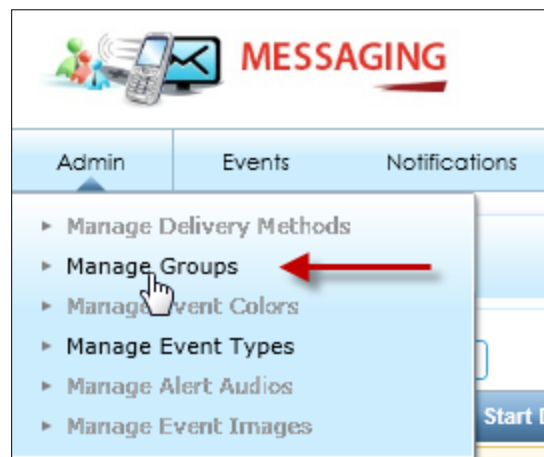
2. This will open the first screen where you can begin entering your criteria to select the persons you want grouped. In this example, we are choosing all persons associated with EDs in Region 1, Tier 1 Hospitals:

3. Once you have entered your criteria, click "Next" to go to the final page. You will see your criteria along with the results in the "Group Member Details" box:
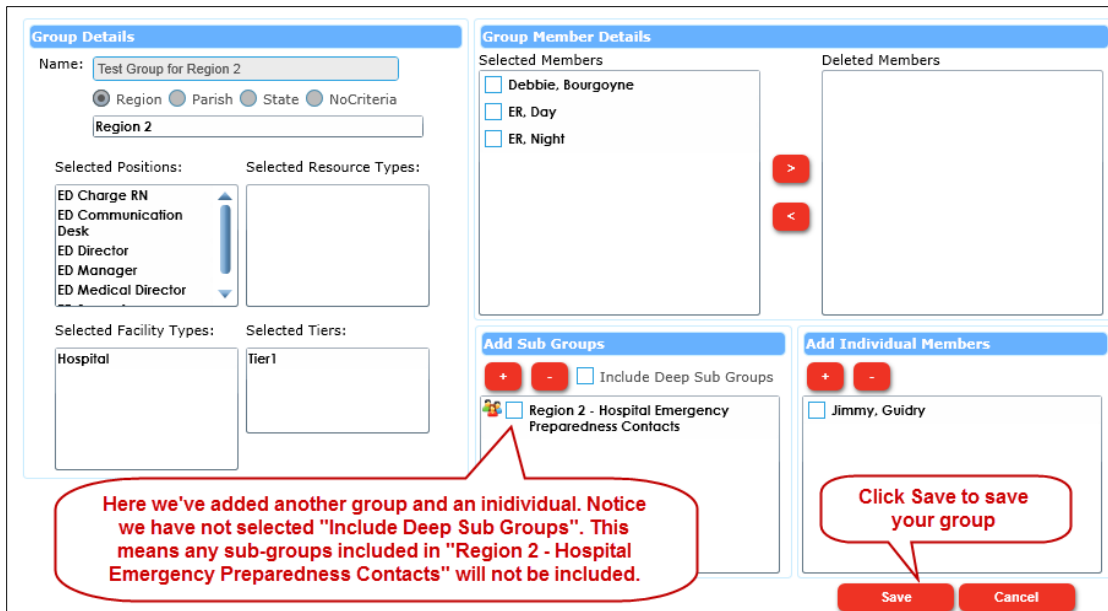
On moving to this page, you will see the criteria you selected, and the results of your selection will be displayed.

4. From here, you can do the following:
    a. Remove persons you don't want in the list
    b. Add Sub-Groups: these are other groups you have defined previously. If you check "Include Deep Sub Groups" any sub-groups used to define the one you are inserting will be included.
    c. Add Individuals: You can search for and add other individuals not included in your search criteria or in other appropriate sub-groups.
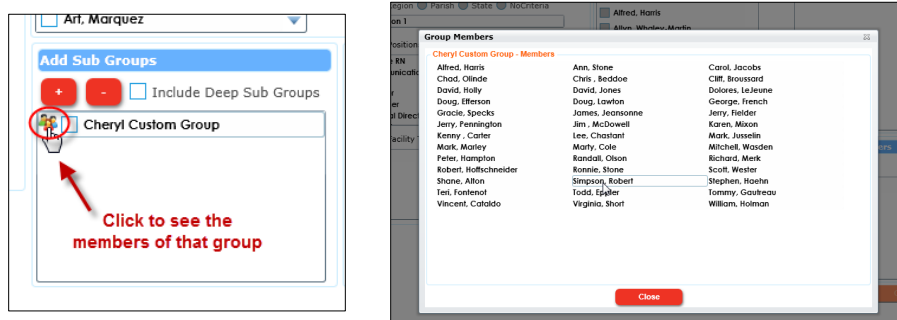
Here's a diagram of how sub groups can be used:
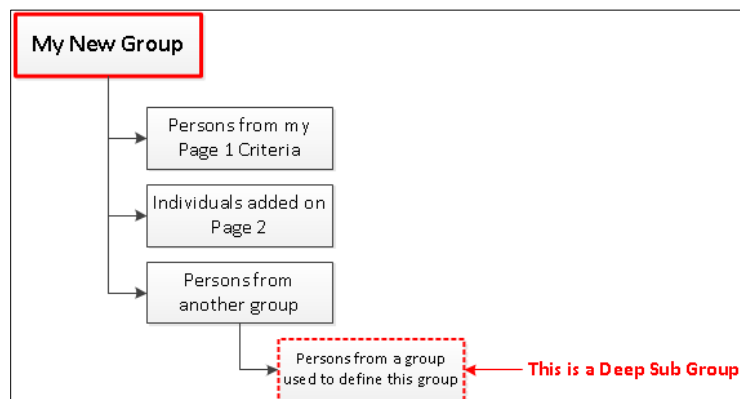
5. Once you have made your selections on page 2, click "Save"

6. Clicking the Persons icon next to the sub-group will display the members of that group:

7. This will take you back to the Groups view and you can see the total number of persons included in your new group:
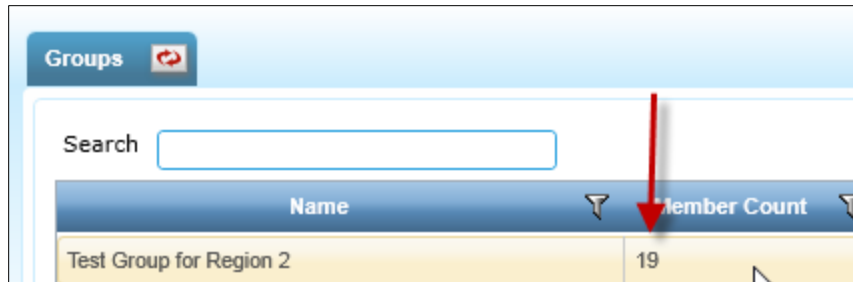
8. This group can now be used in Notifications, Notification Templates, and Quick Notifications.

Has your Region talked about common groups that would be useful in messaging during events?

Remember that the LERN Communications Center is available 24/7/365 to assist you're your messaging needs. They can assist in notifying others in your region about an incident or other important news.

SECTION 3: SECURITY

The new ESF 8 applications can contain information on two "entities":

1. A "Person"
   a. This is really a contact. It is someone that may need to receive messages from ESF 8 or other hospital
   b. Persons do not have to be system users with log-in accounts.
2. A "User"
   a. These are "persons" that need to access one or more of the ESF 8 systems.
   b. A "User" must exist as a "Person" before you can create an account for them.

This section will show you step-by-step how to create both a Person and a User.
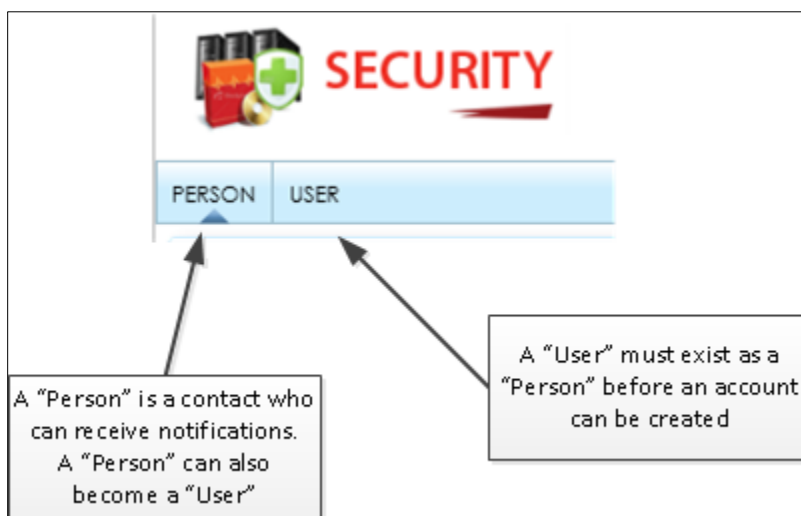
Creating a New Person

1. Enter the Security Management module after logging into the Portal:

2. Once in the Security Management module, search for the person to avoid any duplicates:
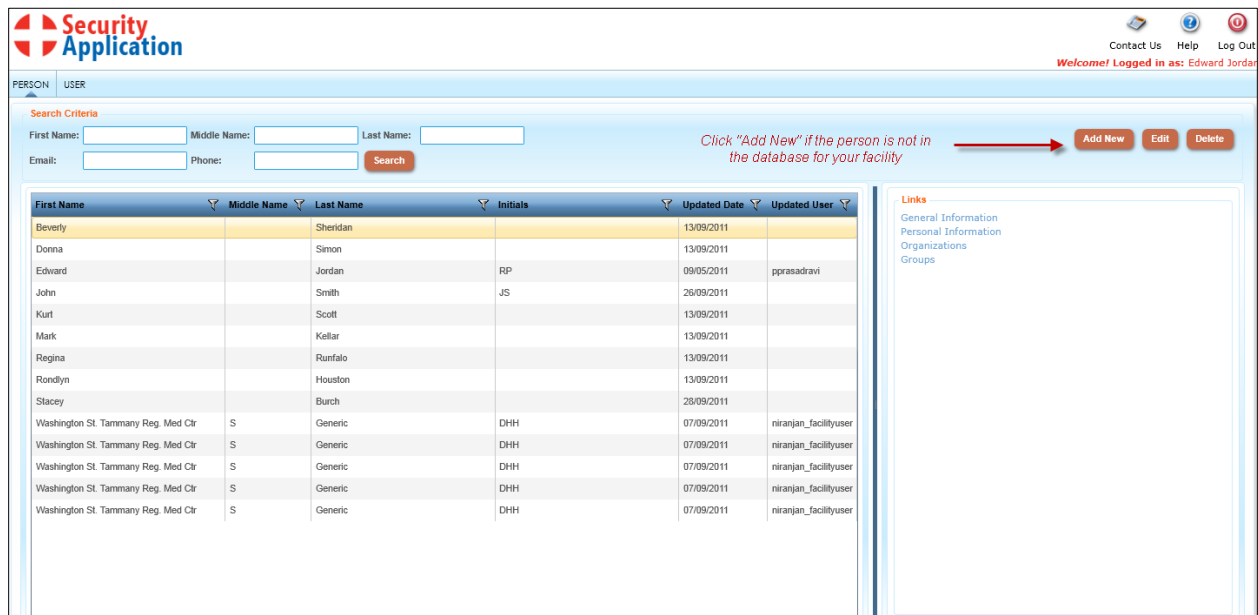
3. Once you have determined that the person does not exist in the Security system, click "Add New" to enter a new person:

    a. Note that you can give a person multiple "Positions" or job titles. This has implications for the contact information that is displayed in pop-ups in the Resource Management module.

Every hospital should have a minimum number of people and positions defined in the Security Module. This allows the easy creation of Notification Groups for emergency messages and gives the Hospital DRCs and you more control over who gets notified of different events in your facility. Here's what we suggest:

    1. Every hospital should have persons with the following minimum Positions defined for their staff in the Security Module:
   - CEO
   - Emergency Preparedness Coordinator
   - Facility Point of Contact
   - LERN Point of Contact (for Tier 1 hospitals)
   - LERN Referral Coordinator (for Tier 1 hospitals)
   - Director of Nursing and/or Chief Nursing Officer (even if these are not quite the position names in your facility)
   - House Supervisor
   - ED Nurse Director
   - Director of Plant Operations
   - ED Communication Desk
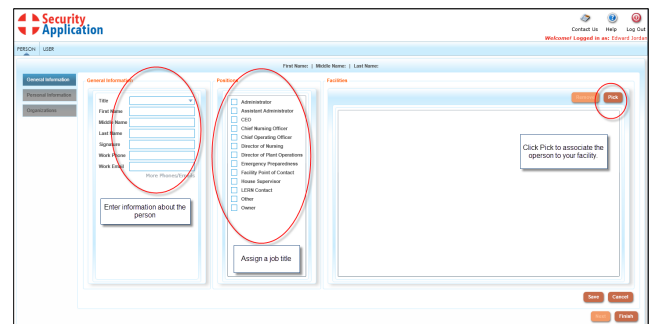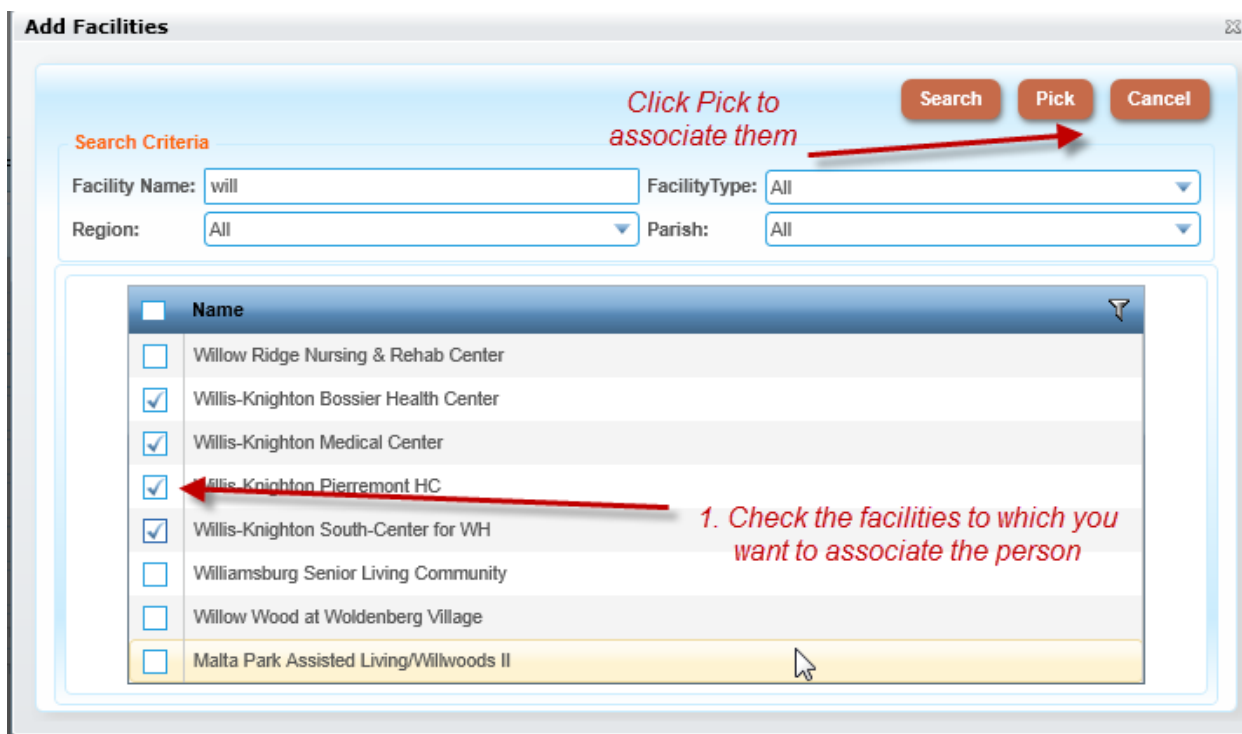
2. It is possible to give a person multiple titles.
    - You can also give multiple people the same title
    - You can create position-based "persons" and give them these titles

3. For "position-based" persons such as "House Supervisor" or "ED Communication Desk", you can assign non-working telephone numbers and email addresses if none exist for these positions. Again, the purpose is to give everyone the ability to target emergency messages to those that need to know in your facility.

When you create a "position-based" person, DO NOT put "generic" in the last name field. Persons with "generic" in the last name field (like the generic hospital accounts) do not appear in searches. We suggest using the name of the facility in the last name field.

4. When you click "Pick", simply click on Search. Only the facilities to which you are associated will appear. Click the box next to your facility name in the pop-up, and click "Pick".
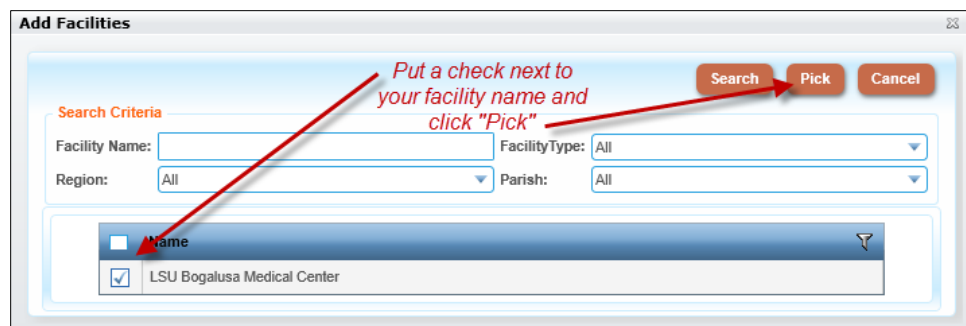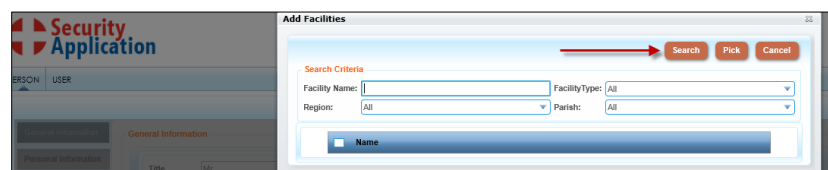
5. Please note that you can associate a person with multiple facilities. This example uses an organization with multiple campuses. After clicking "Search", you can see the facilities to which the Facility Admin is associated. This should be noted when requesting a Facility Point of Contact account. While each facility can have a Facility Point of Contact, we can associate that person: with other facilities in a distributed organization:

a. To reiterate, if you are Facility Point of Contact in a larger system with multiple campuses, please indicate that in your request for an account. We can then associate you with those facilities. If you would like each facility to have its own Point of Contact, we can associate the entire group with all or some of the facilities in your organization. Please be clear when requesting a Facility Point of Contact account.

6. Once you have associated the person with a facility (or facilities), you can click Save and then Finish.

7. Your new person will now appear in your facility list:

8. You can now add additional information such as phone numbers and email addresses by highlighting the new person's name and clicking "Personal Information":

9. Each section (Addresses, Phones, and Emails) has an Add, Edit and Remove button. You can add an unlimited number of items in each section.
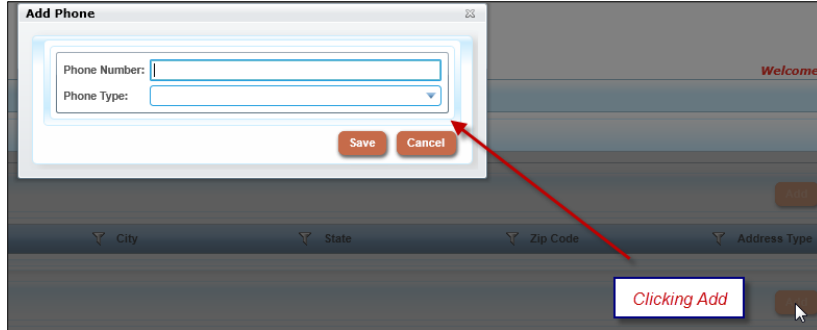
10. When you click Add, Edit or Remove, a box will pop-up prompting you for the appropriate action:
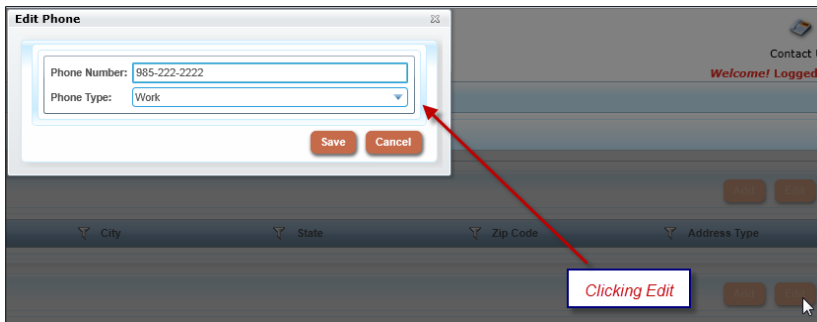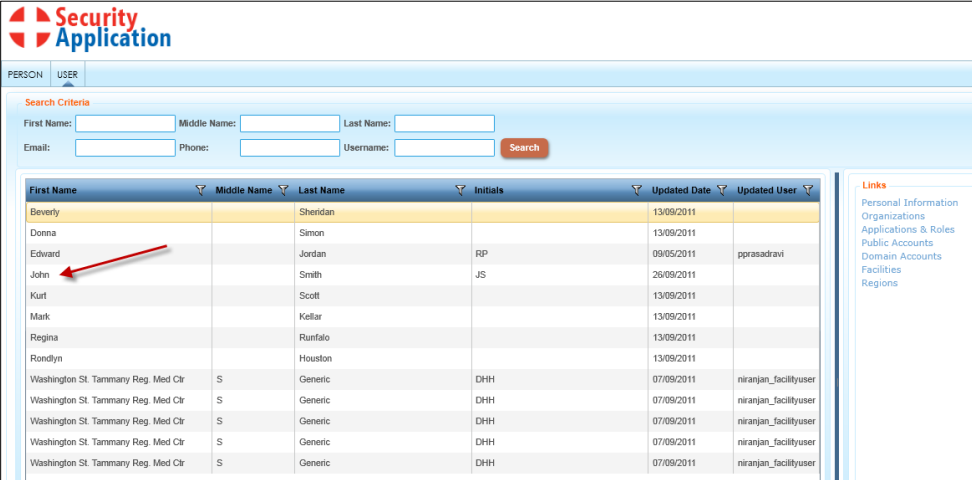
11. Once you have edited or created any personal information, you are finished with this process. Note that this personal information can be edited by the person (if you create them as a user) when they login to the Security Portal by clicking on the "My Profile" tab.

Creating a New User

1. Once the new person is completed, you can now create a User Account for that person by clicking on the User link:

a. By default, all persons in your facility will appear in the list. To create a User Account for John Smith, click on his name, look to the right and click Public Accounts:

2. When you click on "Public Accounts", the following page will appear:

3. When you click "Add", the following window will appear. Complete the fields as directed:

The steps are as illustrated:

    a. Enter the user name and password
        i. We recommend the following procedure for user names: use the first part of the email address. For example, with henry.yennie@la.gov, use henry.yennie as the user name. This helps the user easily remember.
    b. Select three security questions and put in dummy answers
    c. Select "Basic" as the Account Policy
    d. Click Save.

4. When completed, you will get a confirmation message that the account was created successfully:
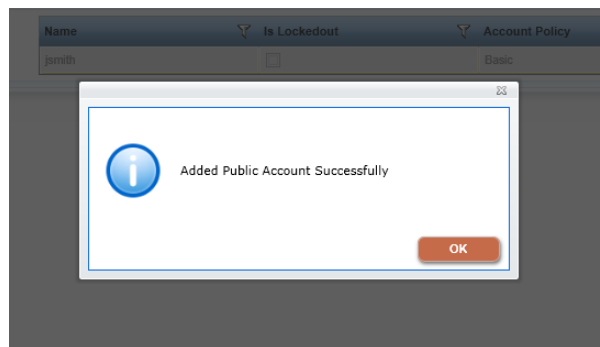
5. Click "OK", and return to the main user screen. You will see the account user name displayed. You can now assign this user to the applications you want him or her to access. Click on the "Applications and Roles" link in the left column.
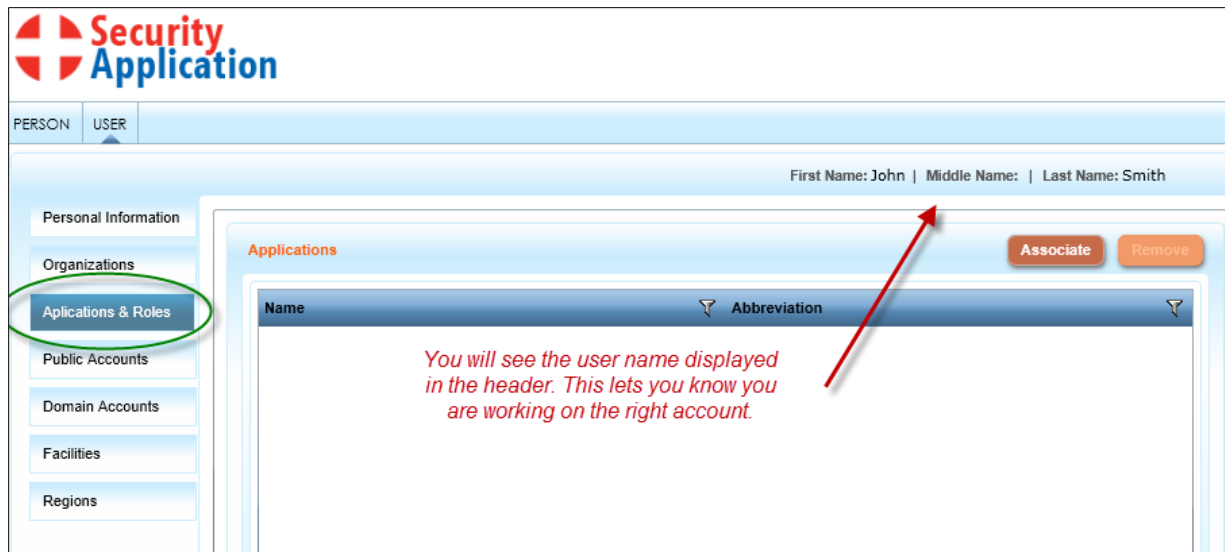
6. When you click the "Applications and Roles" link, the following screen will appear. It will be blank. To begin, click the Associate button.
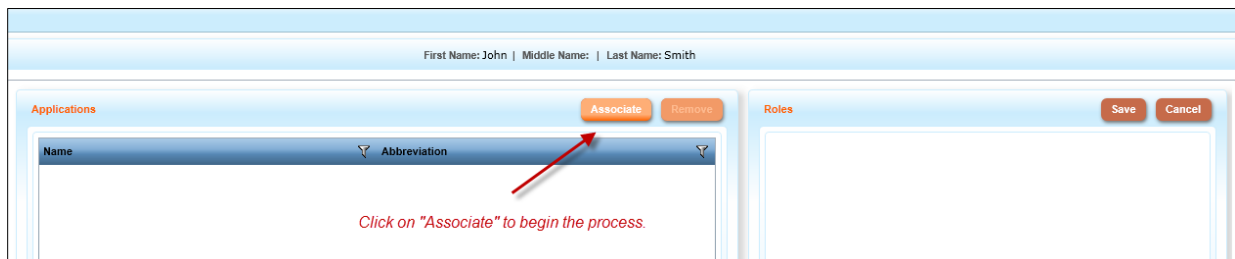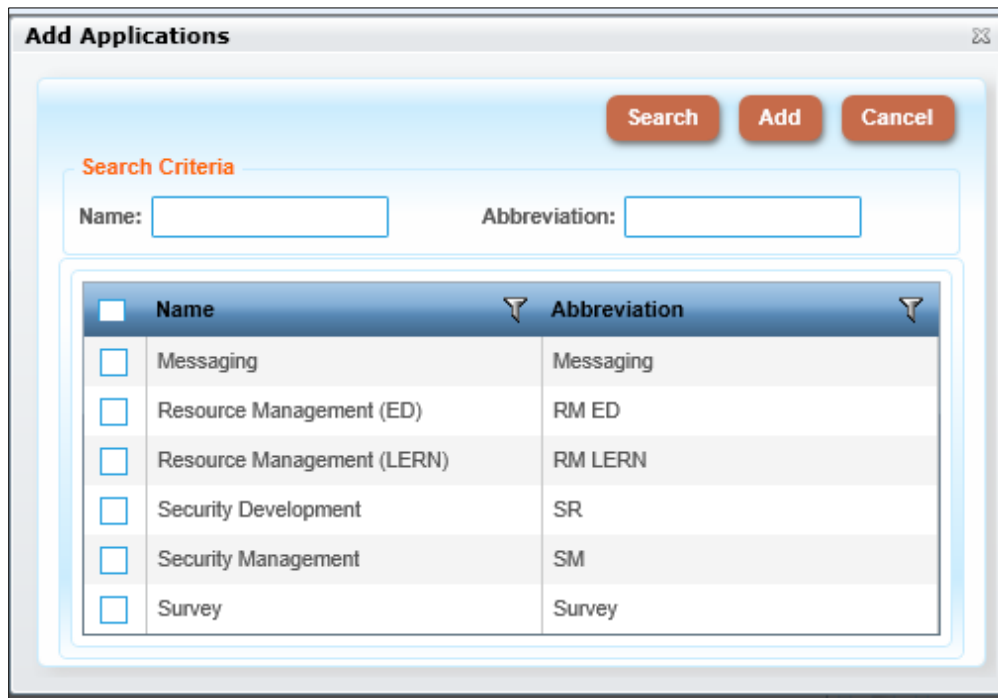
7. When the "Add Applications" window appears, simply click "Search":
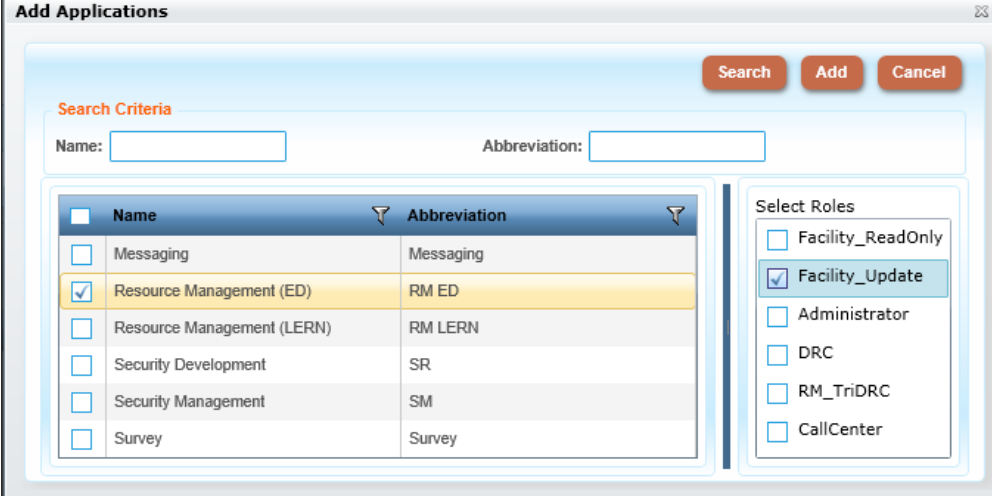
8. After clicking "Search" the available applications will appear in a list:

9. Select each application you want the user to access, and assign the proper role:
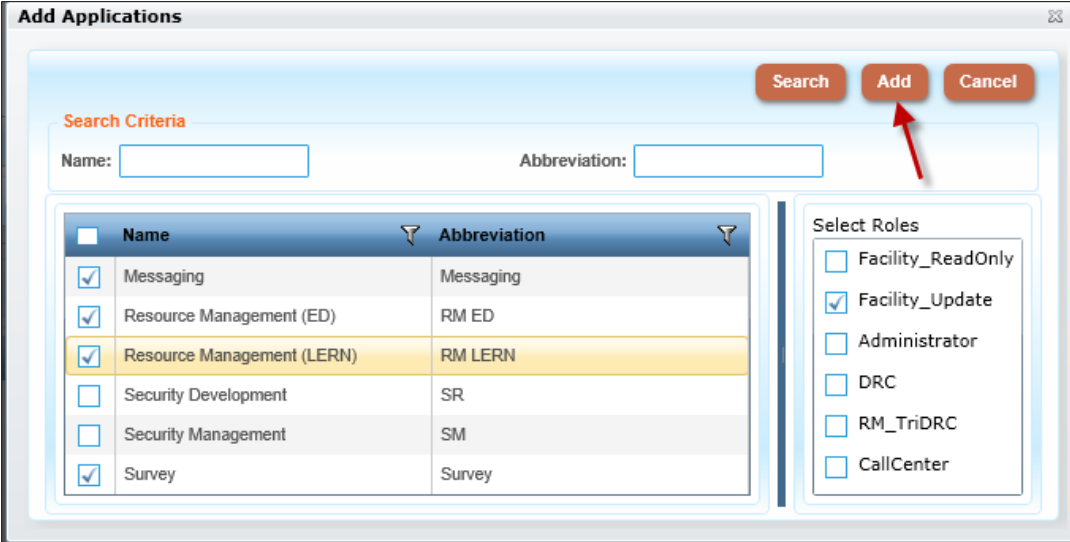
a. Roles are detailed in Attachment 1.

10. When you have completed assigning applications and roles, click "Add" to complete the process:
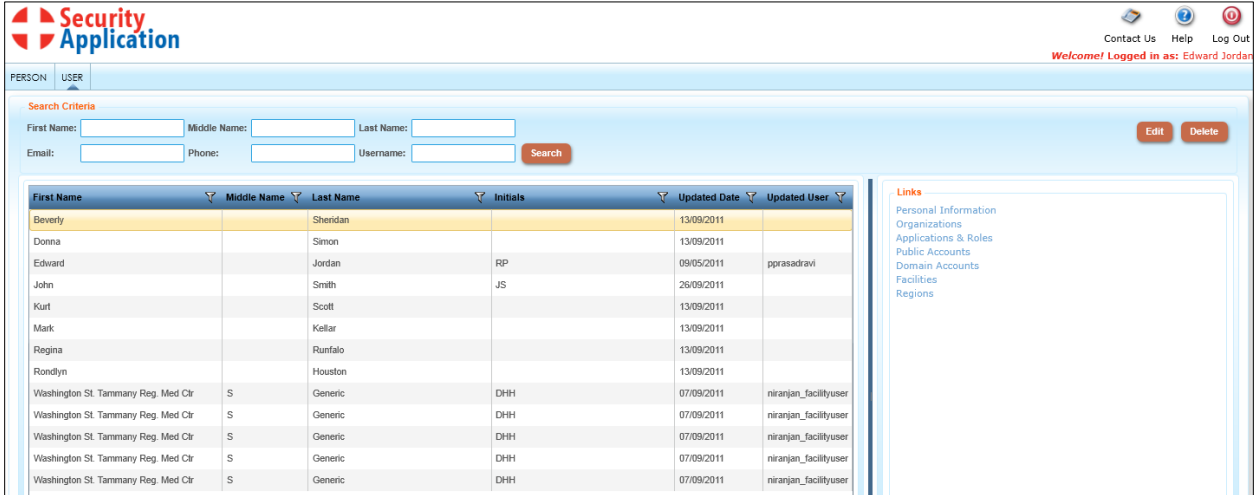
11. Once you have added the applications to the user, you will get a confirmation message. Click "OK" to proceed:
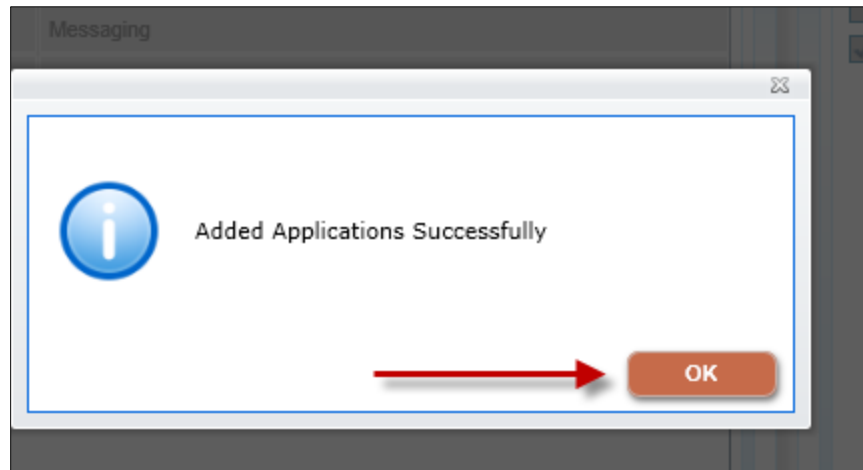
12. Click "Finish" to complete the process:
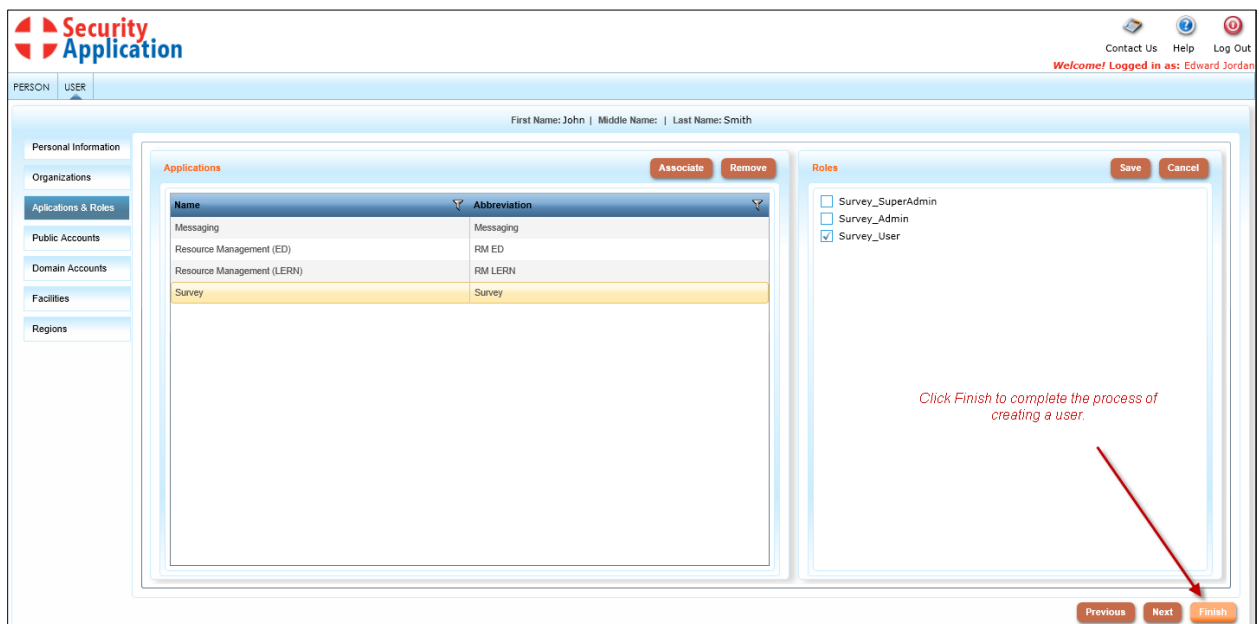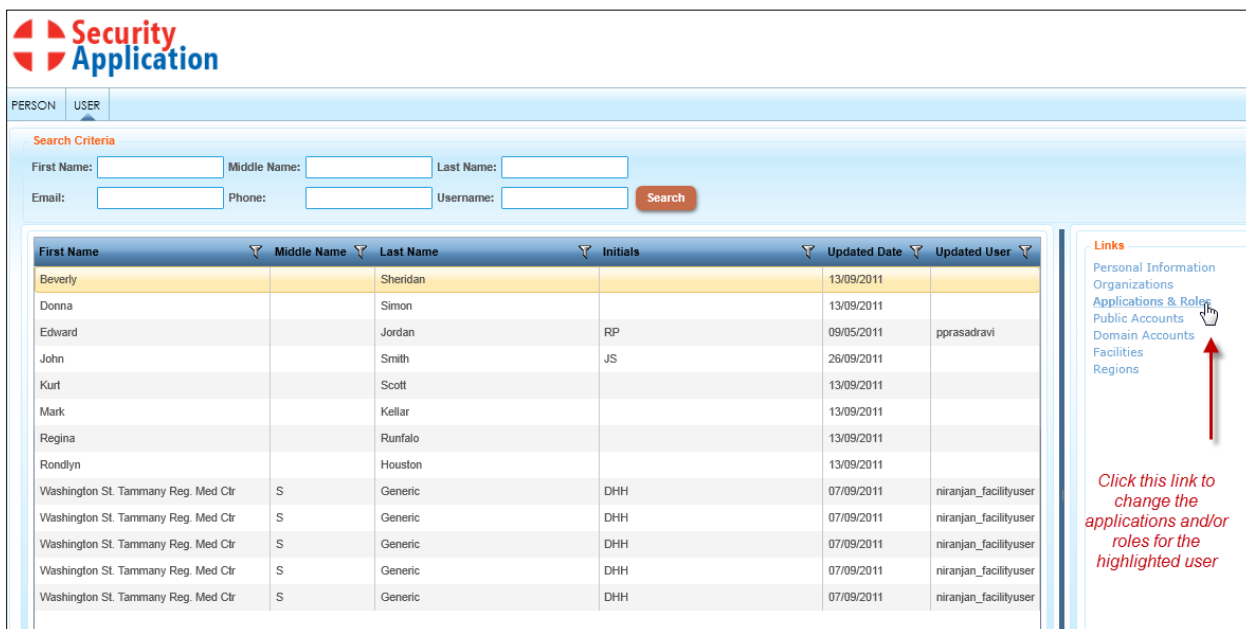
13. You will be brought back to the User dashboard, displaying all users in your facility:

14. If changes are needed, you can locate the user and double-click to edit, or highlight the user and select the appropriate link at the right. For example, if you want to grant a user access to another application or change their role, click "Applications and Roles". From there, you can edit each application and /or add a new one.

This completes the processes of adding a person and adding a user. Questions or comments can be sent to Henry Yennie at henry.yennie@la.gov.

Attachment 1: Roles and Permissions for Use by Facility Points of Contact

Roles	Resource Management: ESF 8/ED					Resource Management: LERN			
	Update Status	Read Only	Create Views	Generate Report		Update Status	Read Only	Create Views	Generate Report
Facility Update	Associated facility or facilities	Facilities in Associated Region (Can see all regions in which an organization has a campus)	No	Associated facility or facilities		Associated Facility or Facilities	Facilities in Associated Region (Can see all regions in which an organization has a campus)	No	Associated facility or facilities
Facility Read-Only	No	Facilities in Associated Region (Can see all regions in which an organization has a campus)	No	Associated facility or facilities		No	Facilities in Associated Region (Can see all regions in which an organization has a campus)	No	Associated facility or facilities
Facility Admin	Yes..	Facilities in Associated Region (Can see all regions in which an organization has a campus)	No	Associated facility or facilities		Yes	Facilities in Associated Region (Can see all regions in which an organization has a campus)	No	Associated facility or facilities

Note that DRCs can see a few more roles and permissions. This will be covered in a separate document.
In Security Management, the Facility Admin can also create persons and users for their facility or facilities. However, they cannot see or modify their own account.

In the Survey application, the roles include a Survey Admin (can create surveys) and a Survey User (can respond to surveys). You can use the Survey User function to distribute sections of surveys out to different staff in your facility.

Persons to Create for Your Organization

Every organization should have a minimum number of people and positions defined in the Security Module. This allows the easy creation of Notification Groups for emergency messages and gives you more control over who gets notified of different events. Your Facility Point of Contact can create these persons and positions.

Here's what we suggest for hospitals:

1. Persons should be assigned the following minimum Positions defined:
    a. CEO
    b. Emergency Preparedness Coordinator
    c. Facility Point of Contact
    d. LERN Point of Contact (for Tier 1 hospitals)
    e. LERN Referral Coordinator (for Tier 1 hospitals)
    f. Director of Nursing and/or Chief Nursing Officer (even if these are not quite the position names in your facility)
    g. House Supervisor
    h. ED Nurse Director
    i. Director of Plant Operations
    j. ED Communication Desk
    k. You give a person multiple titles, and you can give multiple people the same title
    l. You can create position-based "persons" and give them these titles

2. For "position-based" persons such as "House Supervisor" or "ED Communication Desk", you must assign working telephone numbers and/or email addresses if none exist for these positions. Again, the purpose is to give everyone the ability to target emergency messages to those that need to know in your facility. This will ensure that the scrolling notifications in Resource Management views are visible in your ED.

When you create a "position-based" person, DO NOT put "generic" in the last name field. Persons with "generic" in the last name field (like the generic hospital accounts) do not appear in searches. We suggest using the name of the facility in the last name field.

You can download a guide to creating persons and users at CreatingaPersonandUser-v3. Again, if you need help in creating these Persons and positions, call your DRC or send an email to henry.yennie@la.gov or esf8help@la.gov.

1. One of the bigger changes brought by the new ESF 8 portal is that the maintenance of facility contacts is no longer done in EMSTAT. Facility contact information is now maintained by the user in the "My Profile" section of the portal page or by the Facility Point of Contact in the Security module.
   a. **Users** can check their contact information in the "My Profile" section of the Portal home page

From the Portal Home Page
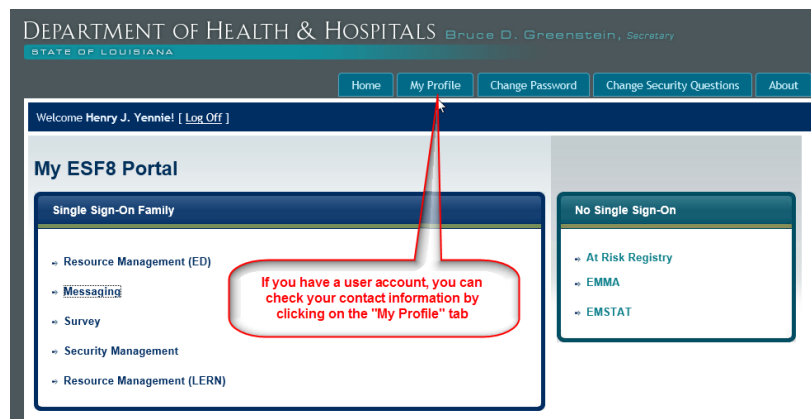
My Profile Options
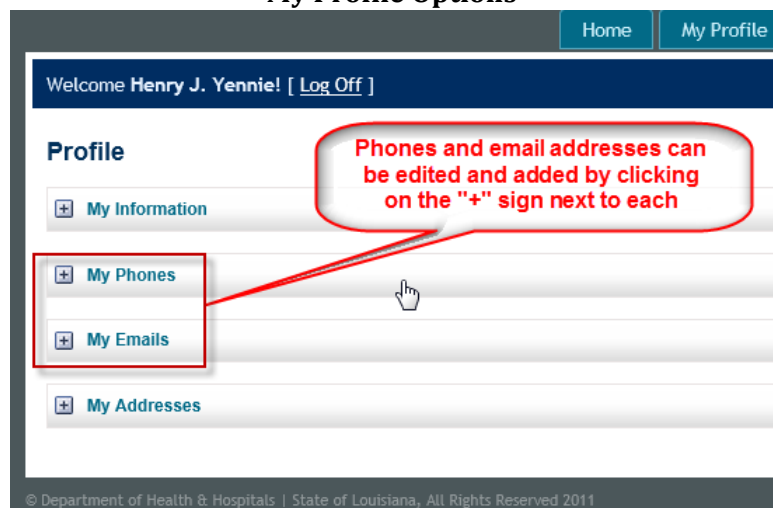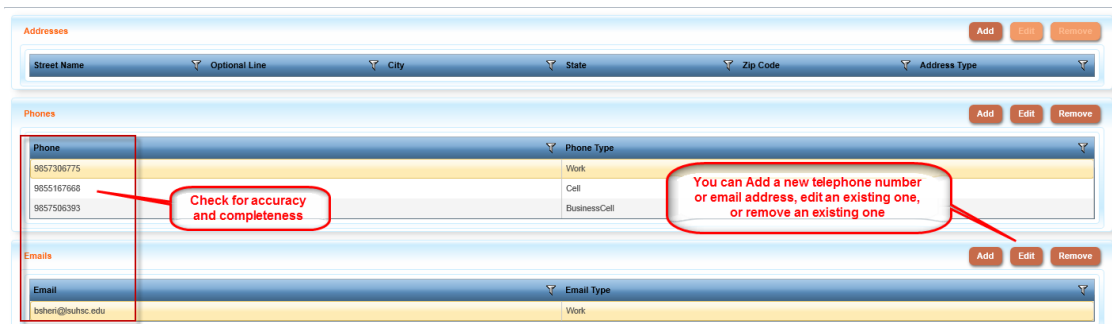
2. The Facility Point of Contact or any other User with access to the Security module can maintain contact information for all persons associated to the facility. When you enter the Security module, you see a listing of persons associated with your facility:
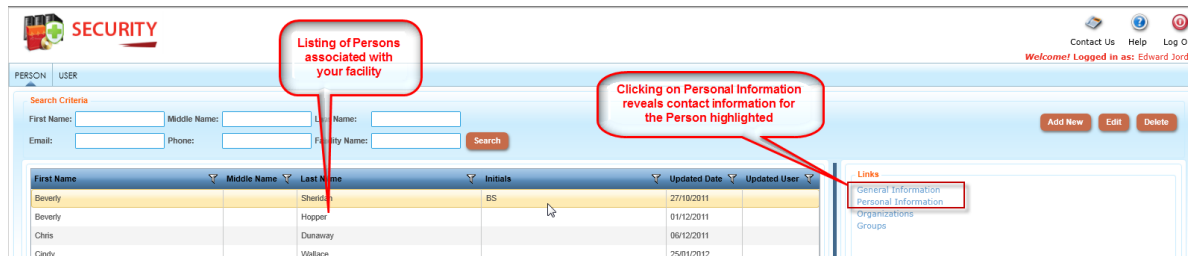
3. To check the contact information for a person, select them by clicking once and:

   a. Double-click to edit
   b. Right-click and choose Personal Information
   c. Click the Edit button at the top right
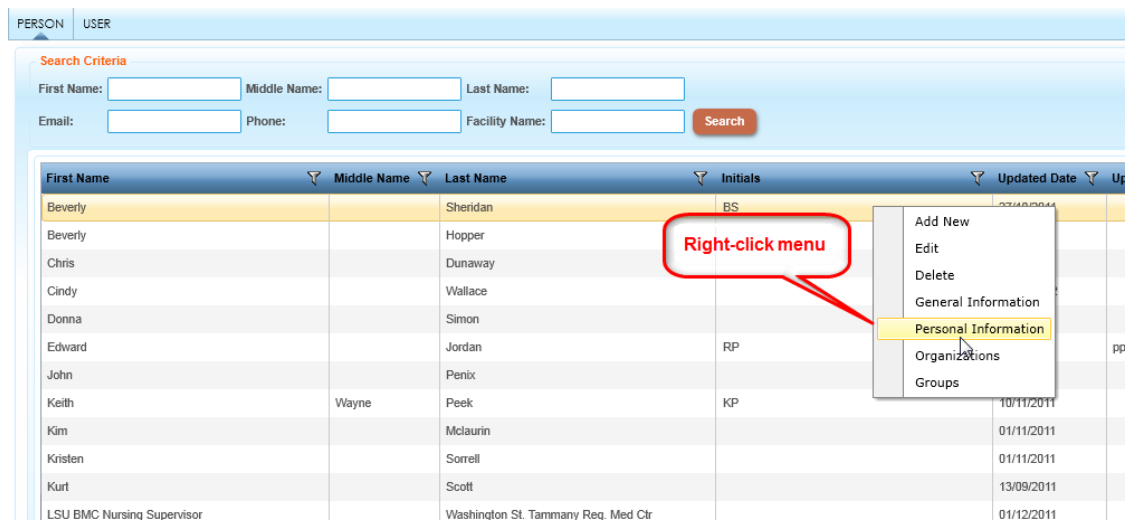
4. Clicking on "Personal Information" reveals the contact information for that Person:

a. From this view, you can add, edit, or remove contact information.

5. Checking this for every person associated with your facility ensures that notifications and messages can get to the right people when needed during incidents and events.

Please refer to the "MasterGuide-v8" document available for download at this site:

ESF 8 Document Portal

This document contains valuable tips on what types of Position Titles need to be associated with Persons at your facility, how to ensure that each Person has the right contact information, and others.

SECTION 4: RESOURCE MANAGEMENT

1. Login to the ESF 8 Portal application. If you have rights to edit the status of your hospital's resources, you will see either Resource Management (ED) or Resource Management (LERN) in your single sign-on box. Click on the appropriate link.

2. Once you click on the right Resource Management link, the screen will open up to the dashboard view for Tier 1 Hospitals in your region (known as the ESF 8→ED view):

	Region 9	Tier	Decon Team Available	Ops Status	ED Status	ED Wait Time	M/S Holds	Tele Holds	ICU Holds	Psych Holds	Additional Hospital Holds	Comments
	Hood Memorial Hospital	1	YES	OPEN	OPEN	GREEN	0	0	0	0	0	
	Lakeview Regional Medical Center	1	YES	OPEN	OPEN	GREEN	0	0	0	1	0	
	Lallie Kemp Medical Center	1	--	--	--	--	--	--	--	--	--	
	Louisiana Medical Center and Heart Hospital, LLC	1	NO	OPEN	OPEN	GREEN	0	0	0	0	0	no peds, no ob, no psych services. no gastro, no urology, no vascular today
	North Oaks Medical Center	1	--	--	--	--	--	--	--	--	--	
	Ochsner Medical Center - Northshore	1	YES	OPEN	OPEN	GREEN	0	0	0	0	0	
	Riverside Medical Center	1	--	--	--	--	--	--	--	--	--	
	Slidell Memorial Hospital	1	YES	OPEN	OPEN	GREEN	0	0	0	1	0	NO NEUROSURGERY AVAILABLE
	St. Helena Parish Hospital	1	YES	OPEN	OPEN	GREEN	0	0	0	0	0	
	St. Tammany Parish Hospital	1	YES	OPEN	OPEN	GREEN	0	0	0	0	0	
	Washington St. Tammany Reg. Med Ctr	1	--	--	--	--	--	--	--	--	--	

Refreshed On: 11/29/2011 3:25:40 PM

This pencil icon indicates you have rights to edit the status of this hospital

   a. As noted, there will be a pencil icon next to your hospital's name indicating that you have rights to edit the status cells in this view.
   b. If there is no icon, talk to your supervisor or the hospital's Facility Point of Contact to get the necessary permissions.

3. You have two options for updating the hospital's status:
   a. Click the pencil icon, or
   b. Double-click inside any one of the cells which you want to update.

4. Clicking the pencil icon opens up another page that allows you to edit all status items at once:

Washington St. Tammany Reg. Med Ctr X

Decon Team Available

Statuses ○ Yes ○ No

Comment

Ops Status

Statuses ○ Evacuation-Full ○ Closed
○ Evacuation-Partial ○ Open
○ Partially Closed

Comment

ED Status

Statuses ○ Evacuation-Partial ○ Evacuation-Full
○ Limited Diversion ○ Closed
○ Open

Comment

ED Wait Time

Statuses ○ Default 1 ○ Yellow ○ Purple
○ Red ○ Black ○ Green

Comment

M/S Holds

Value

Comment

Tele Holds

Value

Comment

ICU Holds

Value

Comment

Psych Holds

Value

Comment

Additional Hospital Holds

Value

Comment

Facility Comment

Comment

5. You can update any or all of the items as needed. Once you've completed the update, click the "Save" button and your changes will be reflected in the dashboard view.

6. Double-clicking inside one of the cells opens that cell up for editing:

One of the more useful features of the new ESF 8 system is the ease with which you can run reports about your facility's activities. In this Quick Step, we'll look at how to produce a report in the Resource Management application. Many of the steps outlined are applicable in all of the reporting sections of each ESF 8 module.

1. After logging in and navigating to the Resource Management module, you have access to Reports regardless of which view you choose. In this example we will start from the LERN view.

2. Since we are interested in running a report about LERN status items, we'll choose LERN Trauma to start with.

3. After clicking on Trauma, you will be presented with the following screen. You choose what report you want to run by clicking on the button on the left side of the screen:
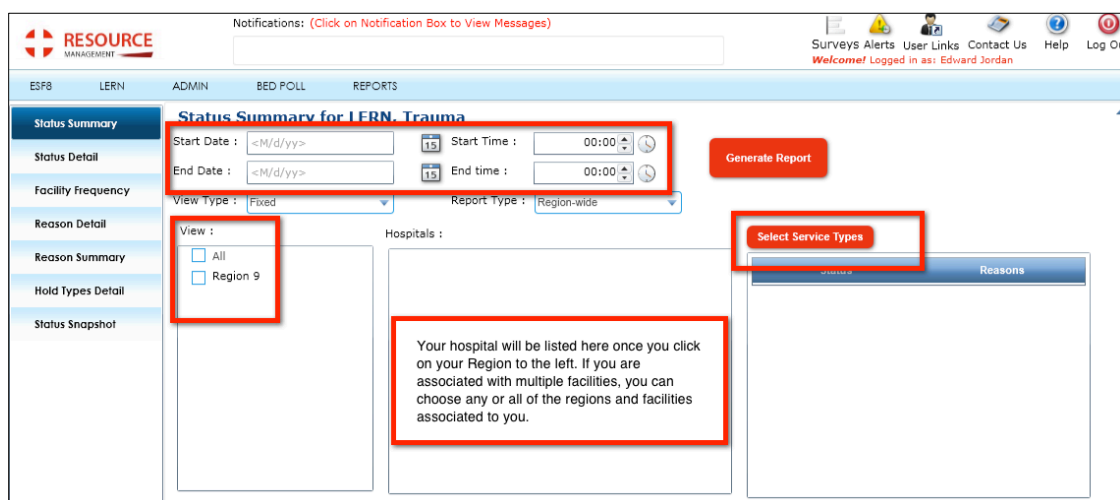
4. Once you choose your report, you will be presented with dialogue boxes that allow you to set your report criteria. You can set the date and time ranges you want along with the exact service and status condition. You will note that you can only report on those hospitals to which you are associated.
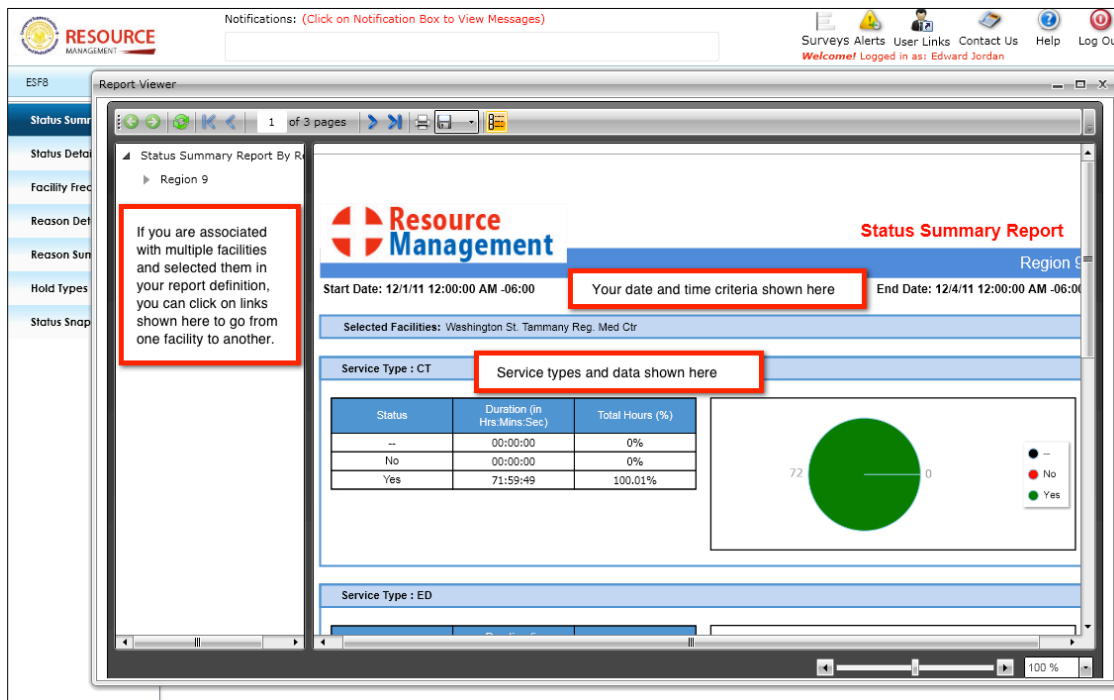
5. Once you have selected your hospital, click the Select Service Types button:
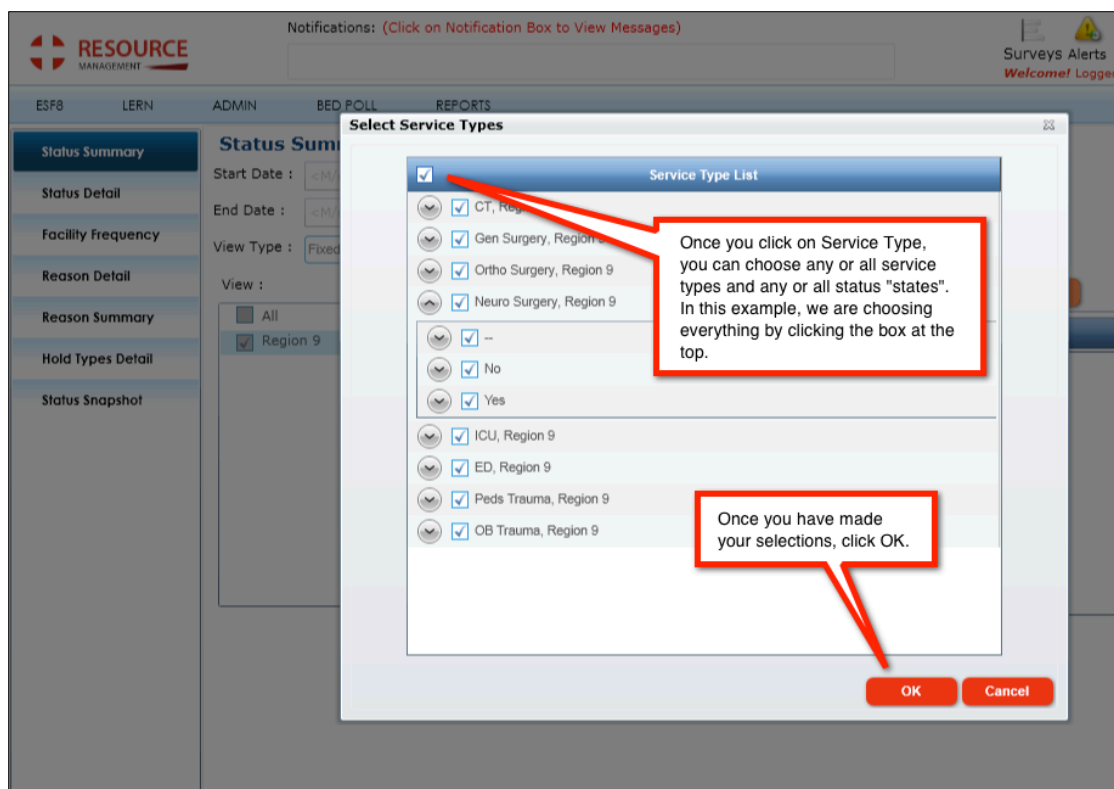
6. Once you've selected your service types, you are now ready to generate your report by clicking the "Generate Report" button:
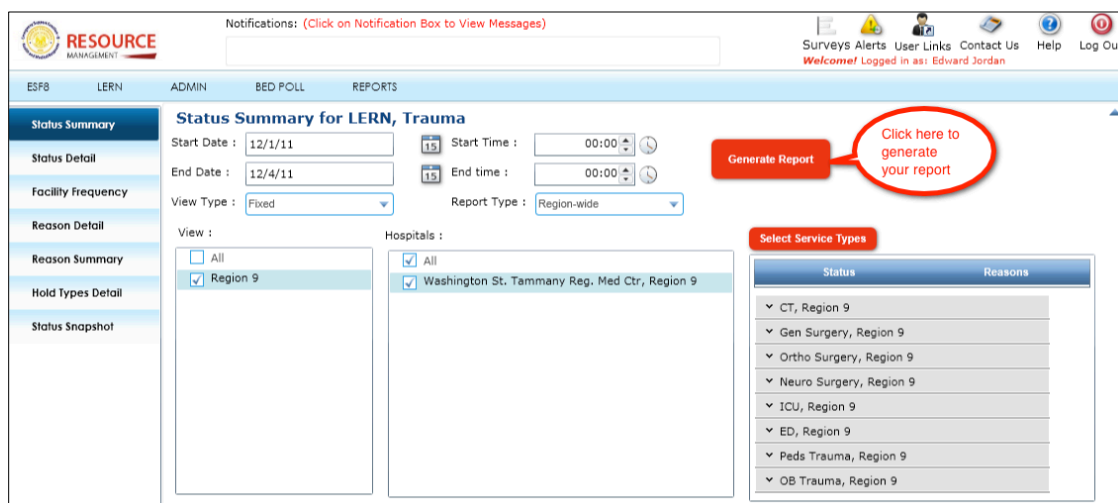
7. Your report will open in a new window displaying the results of your selections:
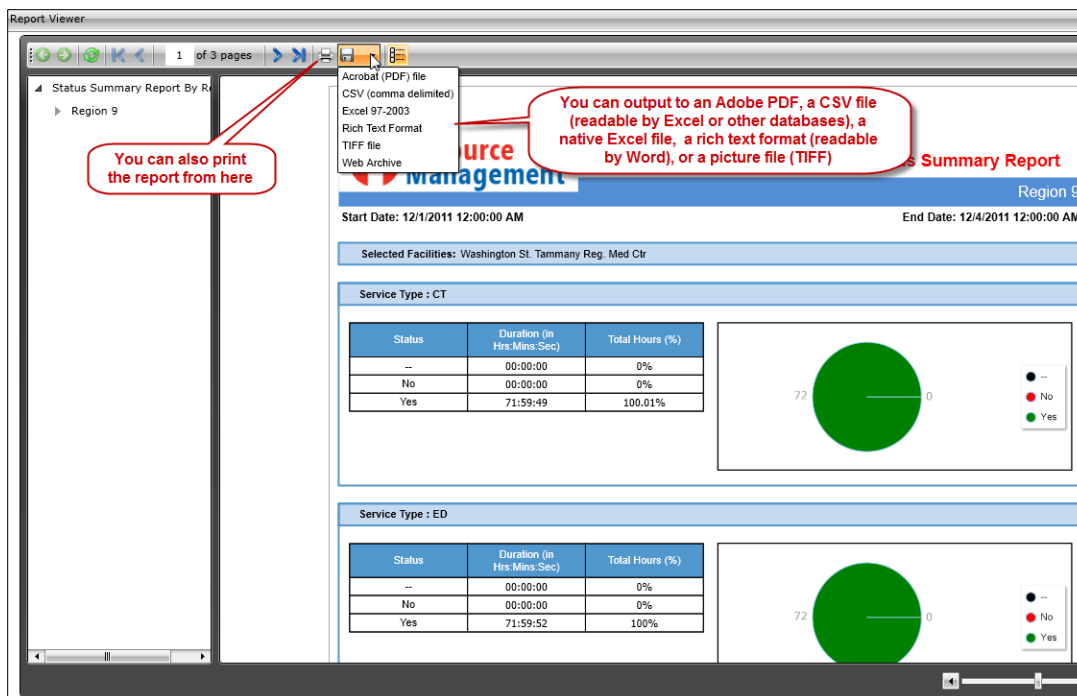
8. Once you have generated your report, you have several output options from the reporting window:
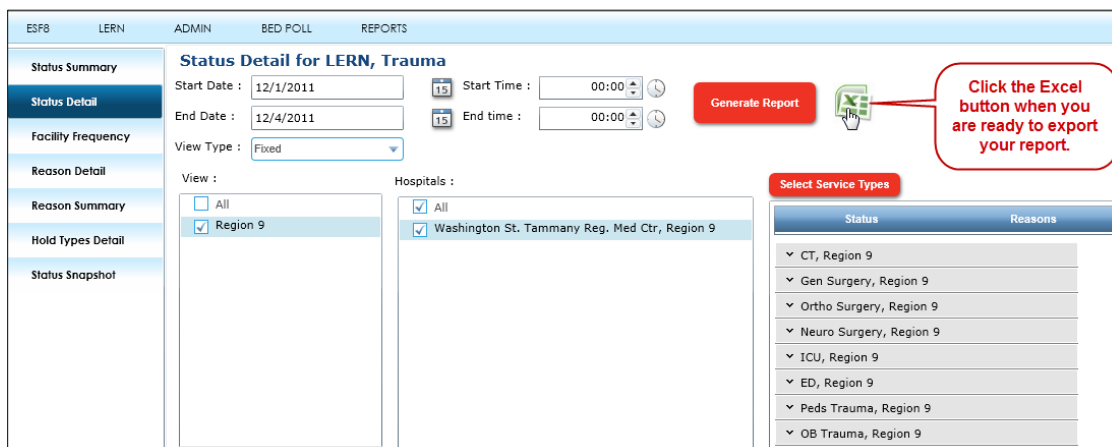
9. If you would rather have your data in a flat file from which you can make your own charts and pivot tables, you can select the Status Detail report. Selecting this report will save your region and hospital selection, but you will have to re-select your Service items. Once you've completed this step, you can click the Excel button.

10. When clicked, you will be asked to save your file. Pick a location and click Save.
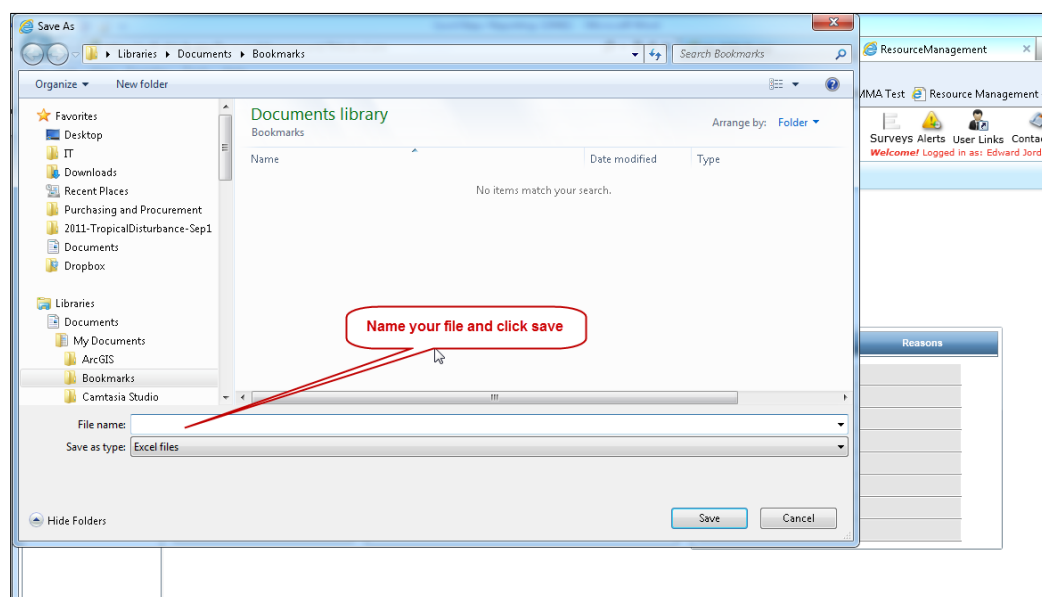
11. Once saved, you can open your report in Excel and create your own summaries, charts and pivot tables.
12. In any report, in any module, if you see the Excel button on the Report page, you can export your data in this format.
13. The reports module works the same way regardless of your view or whether you are in Messaging or Resource Management
14. We will continue to increase the number of report options available in the near term.

	Facility Name	Region	Parish	Tier	Service Type	Status	Start Date	End Date
2	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	CT	Yes	12/1/2011 12:00:00 AM	12/1/2011 4:06:53 AM
3	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	CT	Yes	12/1/2011 4:06:54 AM	12/1/2011 3:58:44 PM
4	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	CT	Yes	12/1/2011 3:58:54 PM	12/4/2011 12:00:00 AM
5	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	ED	Yes	12/1/2011 4:06:54 AM	12/1/2011 3:58:48 PM
6	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	ED	Yes	12/1/2011 12:00:00 AM	12/1/2011 4:06:54 AM
7	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	ED	Yes	12/1/2011 3:58:56 PM	12/4/2011 12:00:00 AM
8	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	Gen Surgery	Yes	12/1/2011 12:00:00 AM	12/1/2011 4:06:53 AM
9	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	Gen Surgery	Yes	12/1/2011 4:06:54 AM	12/1/2011 3:58:45 PM
10	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	Gen Surgery	Yes	12/1/2011 3:58:55 PM	12/4/2011 12:00:00 AM
11	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	ICU	Yes	12/1/2011 12:00:00 AM	12/1/2011 4:06:54 AM
12	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	ICU	Yes	12/1/2011 4:06:54 AM	12/1/2011 3:58:46 PM
13	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	ICU	Yes	12/1/2011 3:58:56 PM	12/4/2011 12:00:00 AM
14	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	Neuro Surgery	--	12/1/2011 4:06:54 AM	12/1/2011 3:58:46 PM
15	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	Neuro Surgery	--	12/1/2011 12:00:00 AM	12/1/2011 4:06:54 AM
16	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	Neuro Surgery	--	12/1/2011 3:58:56 PM	12/4/2011 12:00:00 AM
17	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	OB Trauma	--	12/1/2011 4:06:54 AM	12/1/2011 3:58:49 PM
18	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	OB Trauma	--	12/1/2011 12:00:00 AM	12/1/2011 4:06:54 AM
19	Washington St. Tammany Reg. Med Ctr	Region 9	Washington	4	OB Trauma	--	12/1/2011 3:58:57 PM	12/4/2011 12:00:00 AM

Your data is now in a flat file suitable for more in-depth analysis

Quickstep: What the Different Reports Mean

Report Name	Content
Status Summary	For the date and time period selected, this report shows the number of hours and percent of total the facility had a particular status, by Service Type. This report has two "modes": region-wide and facility-wide. The Region-Wide mode aggregates all data for facilities in the region. The Facility Wide mode shows only data for your facility. Running both allows you to compare your facility to the Region as a whole.
Status Detail	This report organizes the data from the Status Summary in more detail, giving the duration of each status, by Service Type, for the time/date period chosen. Each Service Type is a separate page.
	It shows the start date/time for each status change, and it contains no data summaries or charts. It This report allows an export of raw data to Excel.
Facility Frequency	This reports shows the number of times, summarized by date, the facility updated any status item.
Reason Detail	This report will allow you to select Service Types only if you have the reason feature enabled for a Service Type or a particular status. Reasons are structure lists of descriptors about a particular status. For example, the software could be configured to ask for a reason if a facility indicated its CT was unavailable. The reason is picked from a list defined by the region.
Reason Summary	This report is not functional at this time. Calculation issues are being addressed.
Hold Types Detail	This report lists the number of bed holds by type and the duration of each, in reverse chronological order. This report is available as an Excel flat file.
Status Snapshot	This report exports to Excel and shows by Service Type, the reason, comments and last update date in a tabular format. It also contains the facility name, region, parish and tier for multi-facility analysis. If the last update was several days before the date chosen, it will display that date.

Purpose

The ability to gather hospital bed availability is a cornerstone of both the state's emergency management plan and participation in the federal Hospital Preparedness Program grant.

Prior to the Resource Management application, bed polls during emergencies were conducted using EMSTAT. Some regions used the Bed Poll function of EMResource on a daily basis outside of declared emergencies.

With the cessation of EMResource, bed polls can now be obtained in either EMSTAT or Resource Management. The database between these two applications for this function is the same. This integration allows the following:

1. Bed types chosen in EMSTAT are reflected in the Resource Management Bed Poll
2. Census reports given in either application are reflected in the other
    a. In a declared event, a facility can give a census report in either EMSTAT or Resource Management

Protocol

The provision of a bed poll in Resource Management follows the same user interface practices as in regular status updates:
1. Clicking the "pencil" icon next to your facility name opens up your entire listing of bed types for editing
2. Double-clicking inside of a particular bed type cell opens that bed type up for editing

Based on user feedback, the display of the Bed Poll differs somewhat from that presented in EMSTAT. The Resource Management Bed Poll display uses a basic framework of the HHS bed type groupings:

1. Medical-Surgical
2. Burn
3. Pediatrics
4. Adult ICU
5. Pediatric ICU
6. Negative Flow Isolation
7. Operating Rooms
8. Psychiatric

The display in Resource Management differs from this basic HHS bed type organization and consists of the following:

1. Adult ICU
2. Medical-Surgical
3. Telemetry
4. Neonatal ICU
5. Pediatric ICU
6. Pediatrics
7. Psychiatric
8. Negative Flow Isolation
9. Burn
10. Operating Rooms

Although the EMSTAT bed types chosen by a facility remain the same, the display on the Bed Poll dashboard follows these logical groupings:

1. Medical-Surgical displays only that bed type. Telemetry beds, contained in that bed type group, are displayed separately
2. Pediatric ICU and Neonatal ICU are displayed separately
3. The Pediatrics display shows only Pediatric Medical-Surgical bed data. Other bed types such as Obstetrics or Nursery/Bassinet are not displayed in the dashboard view.

These logical groupings provide a more useful display of the Bed Poll data.

The bottom line is that you report your bed availability data (staffed capacity and census) by the bed types you've chosen in EMSTAT, and the Bed Poll dashboard displays the logical groupings:
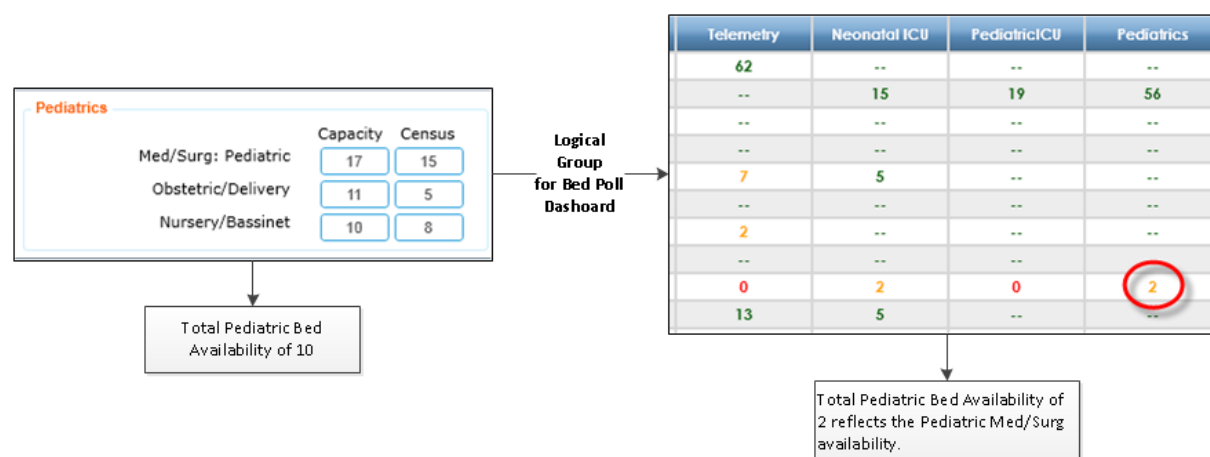
Updating the Bed Poll in Resource Management
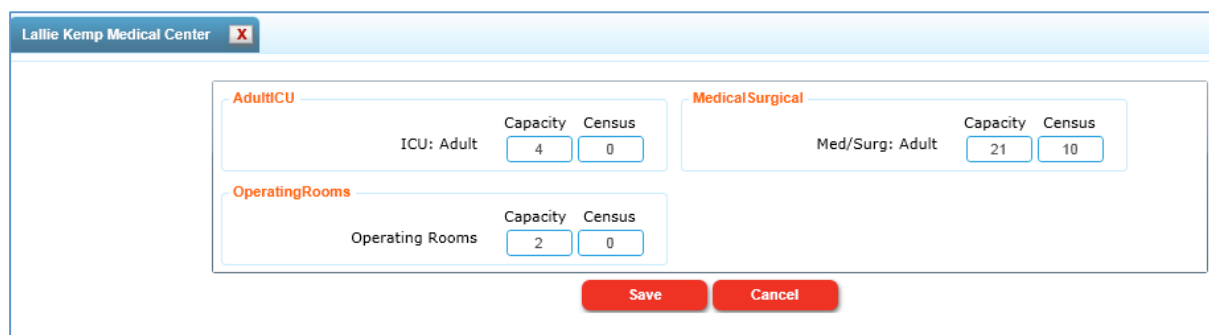
As mentioned earlier, the update process for Bed Polls follows the same user interface practices as in regular status updates:

1. Clicking the "pencil" icon next to your facility name opens up your entire listing of bed types for editing
2. Double-clicking inside of a particular bed type cell opens that bed type up for editing

Here's a display of a typical user's view showing the pencil icon:
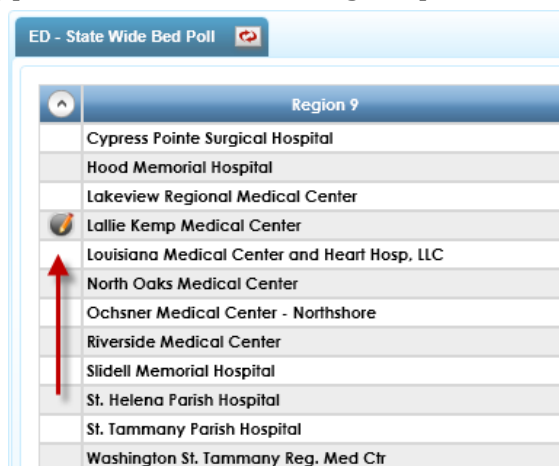
Clicking on the icon opens up the entire bed type listing for editing:

When your edits are complete, click the "Save" button:

The resulting dashboard display shows your edits along with the date and time the updates were entered:

Double-clicking on any cell with a bed type chosen in EMSTAT gives the following edit window:

Once finished updating, click "Save" and the current date and time will show for that bed type cell.

SECTION 5: SURVEYS

1. ESF 8 now has a powerful survey tool that is integrated into the ESF 8 Portal. This new application has the following features:
   a. It allows many users to create a survey and distribute it to others as their permissions and roles allow.
   b. The survey application has powerful question and survey design tools so that very complex survey questions can easily be designed.
   c. It is integrated with the Messaging application, which is used to distribute the notifications to end users.
      i. The Notification is delivered via email and contains the link to start the survey.
   d. Users can stop and start answering on longer surveys.
   e. Other users in your facility can participate in providing answers to sections of a large survey.

2. The process starts with an email from the Messaging module:
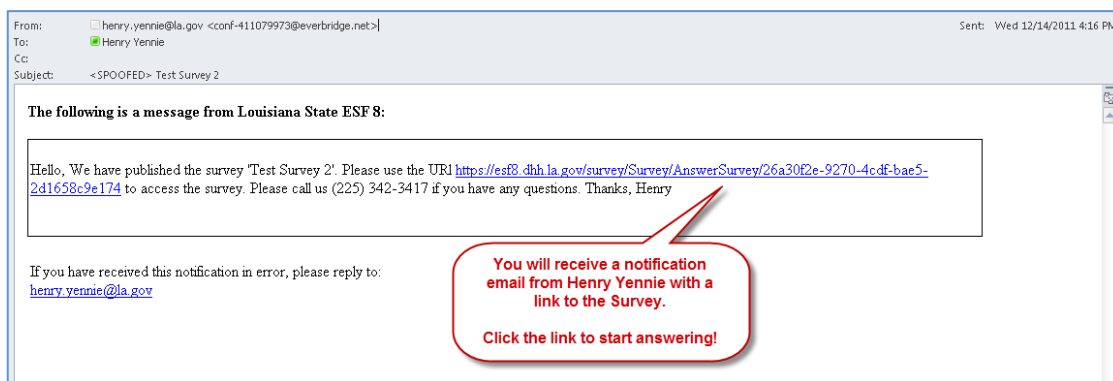
NOTE: If you did not receive an email and believe you should be completing the survey, talk to your Facility Point of Contact and request the following:
- Make sure that you have a user account
- Make sure that you have access to the Survey application as a Survey User.
- Once this is complete, you can have the link forwarded to you. When you click the link and login you will be associated with the survey.

3. Clicking on the link in the email will bring you to the login screen for the ESF 8 portal:
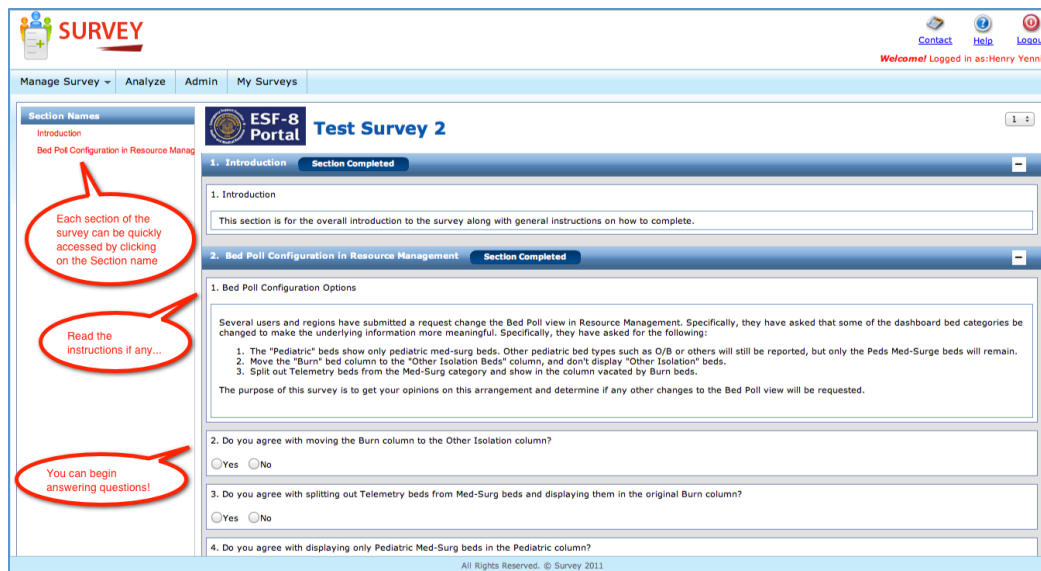
a. If you are already logged in to the Portal, you will be taken directly to the Survey page.

4. Once you click the link (and log in if necessary), you will be directed to the first page of the survey. Here you will probably find instructions on how to proceed along with the first section of the survey. You can also access this survey by logging in to the Survey application and clicking on My Surveys.

5. Once you start answering questions, you have several options:
   a. You can click "Next" or "Previous" on large surveys. Your work on the current page of questions will automatically be saved.
   b. You can click "Save" and then "Close" to exit the survey with your work in progress saved. When you re-open the survey, your answers will still be there.
   c. You can click "Close". This will close the survey and bring you back to a "My Surveys", and your answers will be saved. When you re-open the survey, you can start in any section that is not completed.

d. You can click "Finish". However, if you have not clicked on "Section Complete" at the top of each section, you will get the following message:
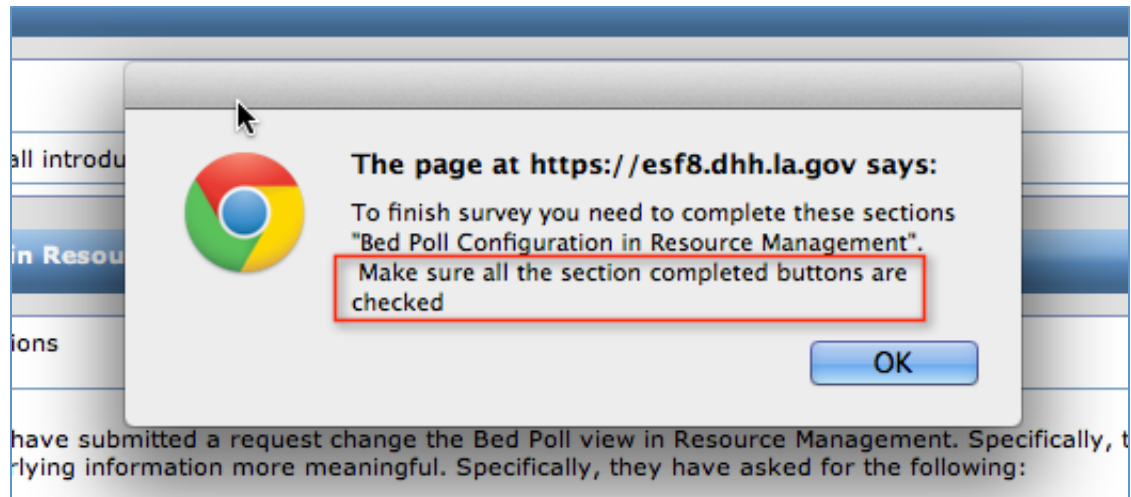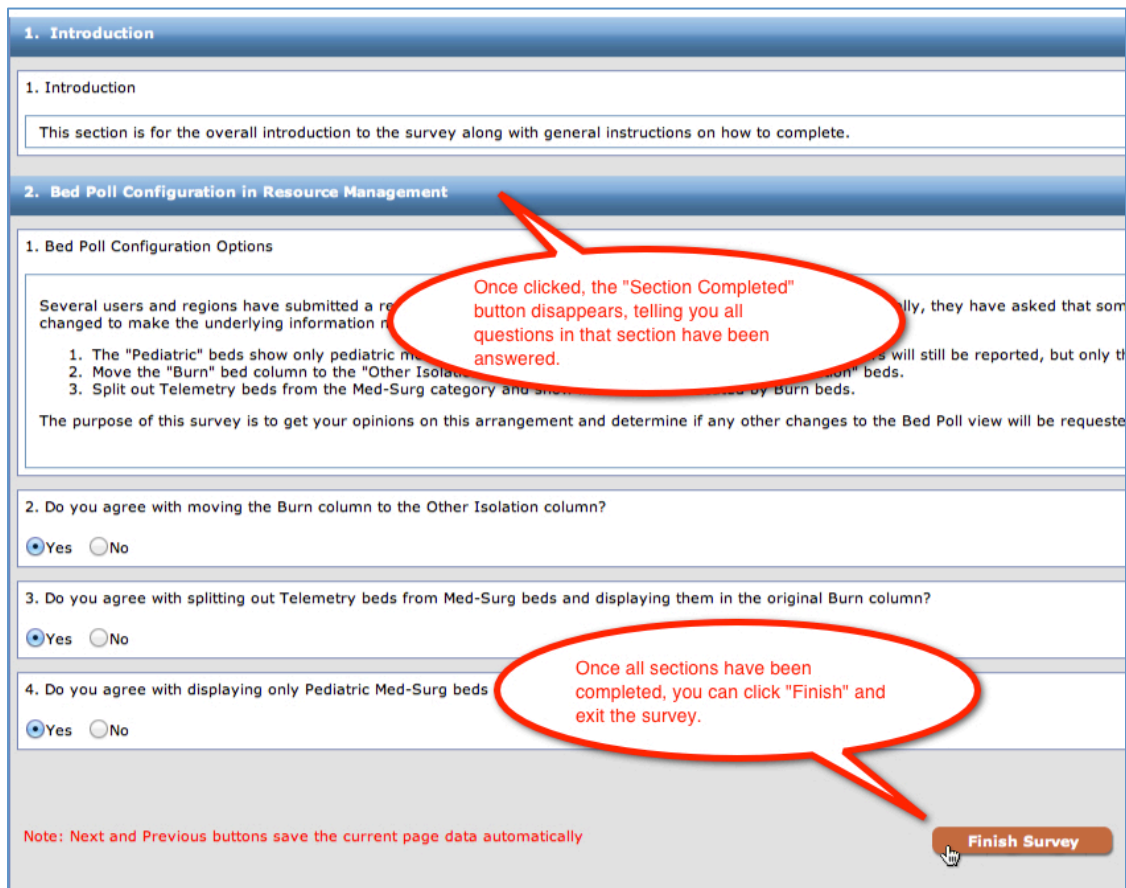
You may get a similar message if you try to complete a section without answering all of the questions.

6. Once you have completed answering the questions in a section, click the Section Completed button on the section bar:
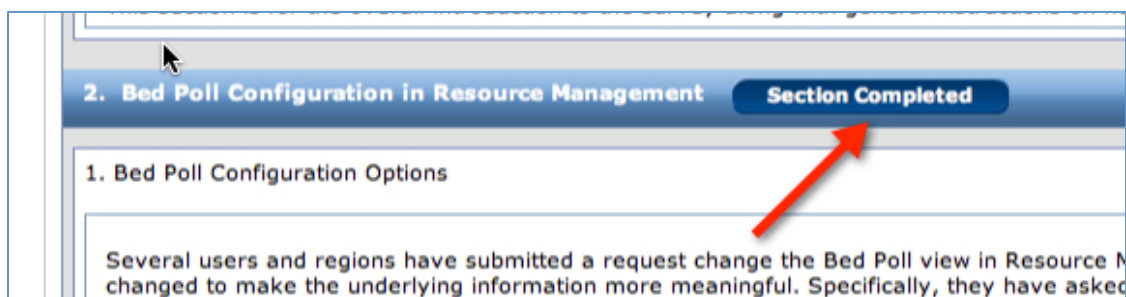
7. Once this is done, you can click "Finish":

8. "Finish" will bring you to a confirmation page indicating whether or not your survey completed successfully. You can then click the "Go to My Surveys" button to work on other surveys or log out of the application.
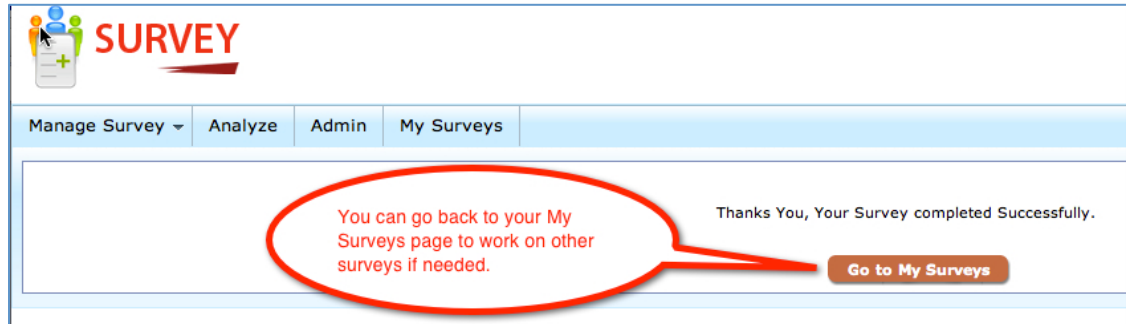
9. When you click "Finish Survey", you will be brought to a page where you can go back to your "My Surveys" page or review your responses.
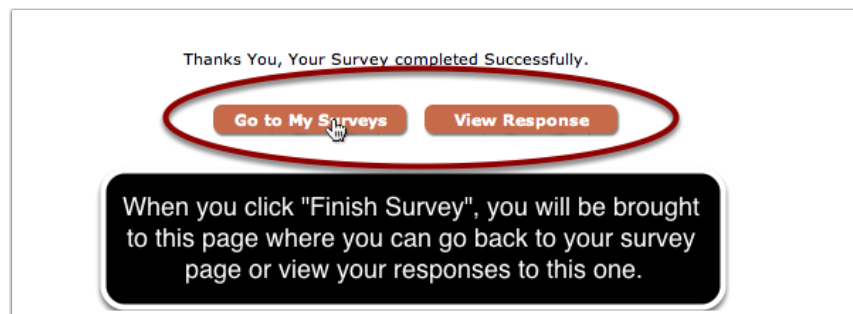
Printing and Saving Your Survey Response

Once you complete your survey, you can go back to view your responses and print out the survey for future reference. The first step is to log in to the Portal and click on Survey. This will bring you to your "My Surveys" page:
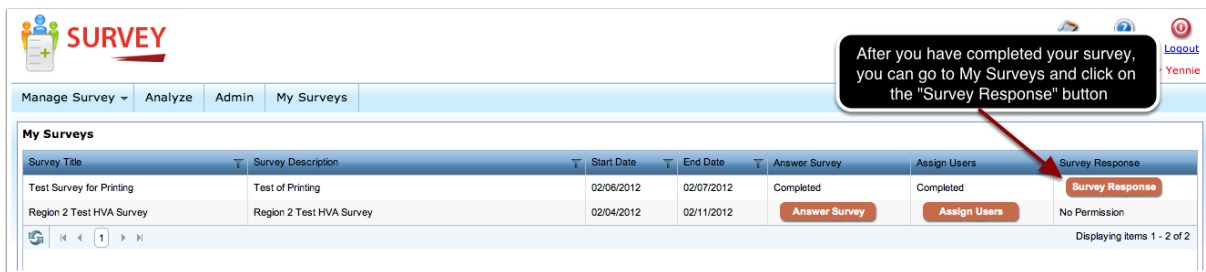
Once there, you can click on the "Survey Response" button for the survey you want to print. This will open the survey for viewing. At the bottom of the page will be a "Print" button. You can click this to bring up your computer's print dialogue.
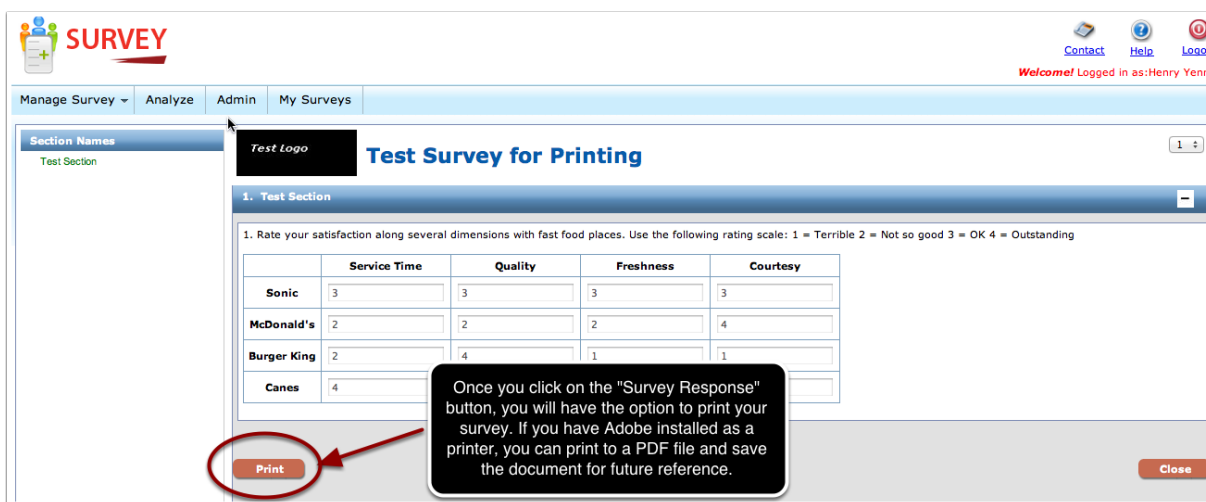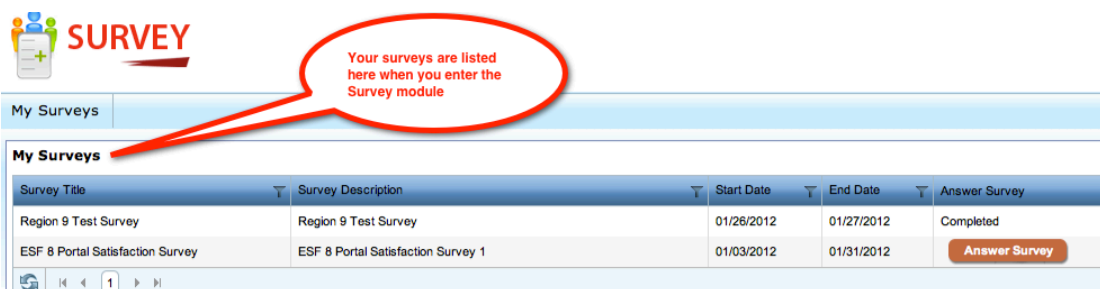
In this dialogue, you can select the printer, number of copies, etc. Your options here are your normal print options. If you have Adobe Acrobat installed, you may have an option to select Adobe PDF as a printer, or you may be able to save the output as a PDF:
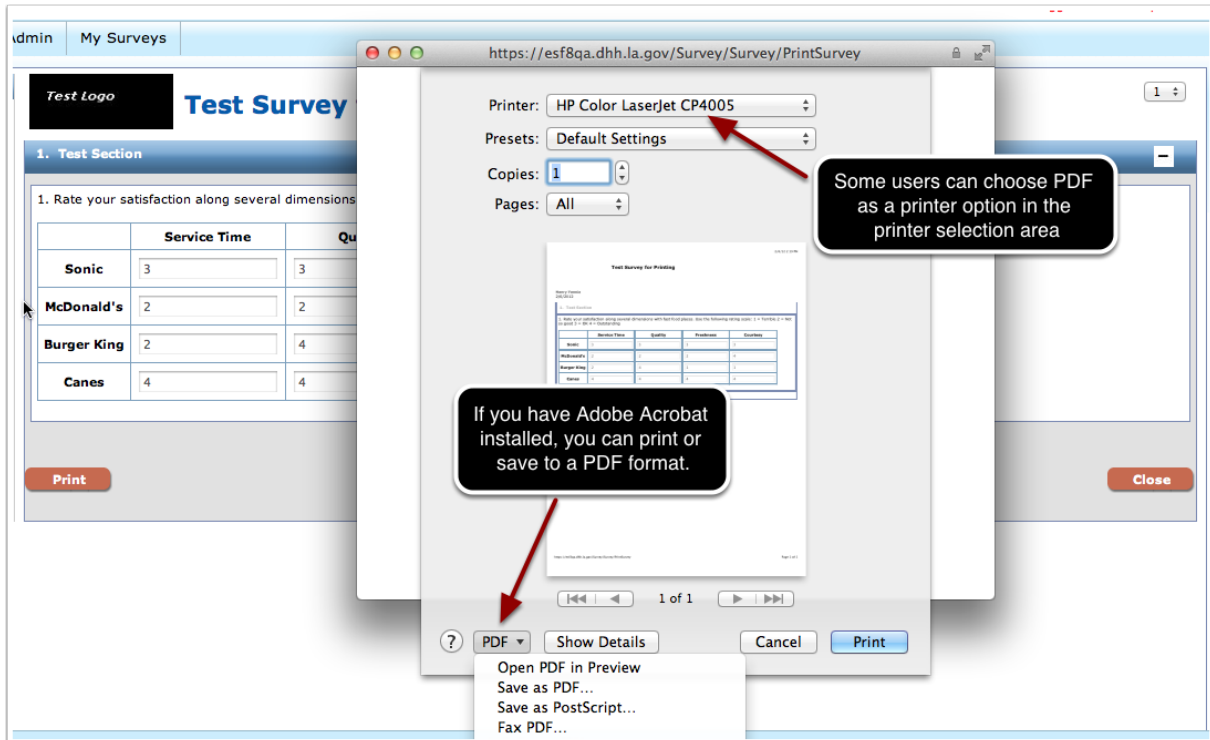
1. The ESF 8 Survey module will be used more frequently in the coming weeks and months as several major HPP grant surveys and regional projects are deployed with this tool. Recent fixes to the Survey module have enabled the following features:
   a. Users that are selected and messaged by the survey creator can now see their surveys under "My Surveys" in the Survey Module **and** by clicking the Survey icon in Resource Management:
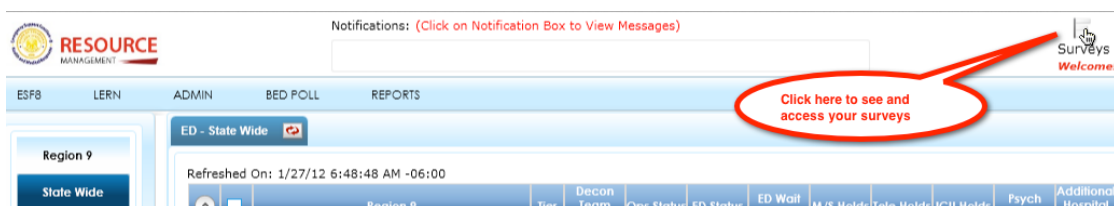
From the Survey Module: My Surveys

Resource Management – Clicking the Survey Button
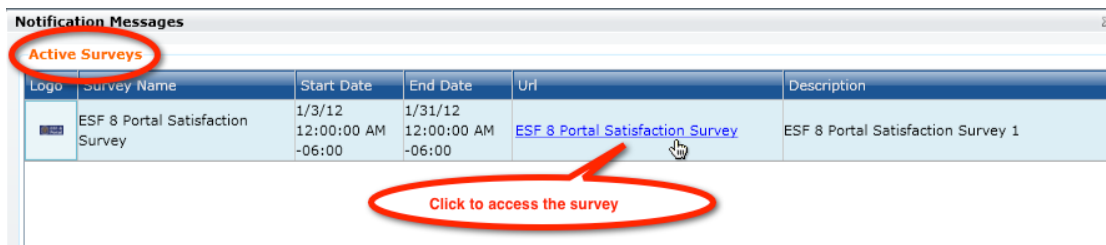
Resource Management – The survey window
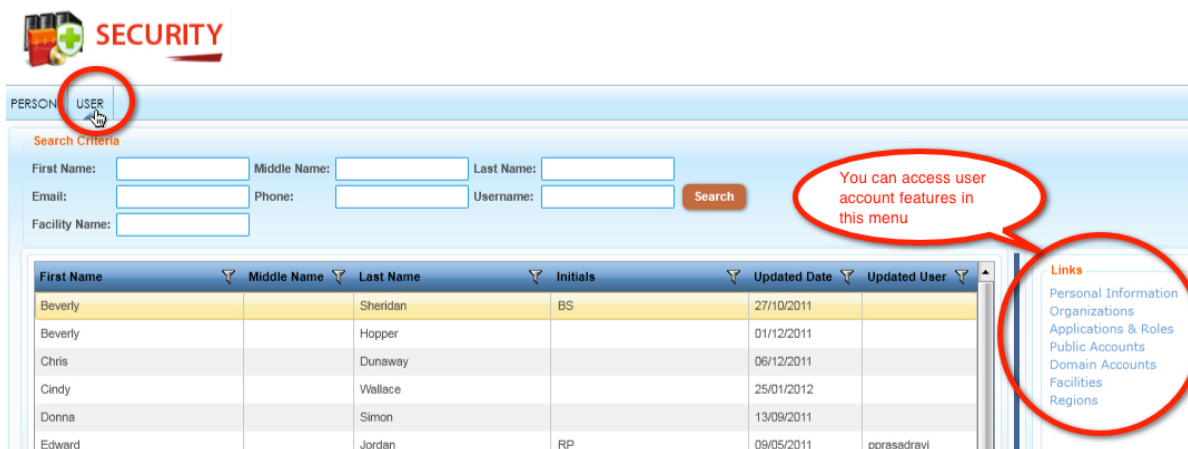
2. One of the most frequent causes of user errors in the Survey module is that the user receiving the survey request does not have the proper access to the Survey module. This lack of access can occur for two reasons:
   a. The user was never given access to the Survey module when their account was created
   b. The user was given access to the Survey module, but no roles or permissions were assigned during the account creation process.

The purpose of this guide is to outline the method to ensure your organization's users have the right kind of access to the Survey module to avoid these common errors.

This process starts with the Security Module:

1. Open the **Security Management** module and click on Users. This will display the persons in your facility along with account options listed to the right:
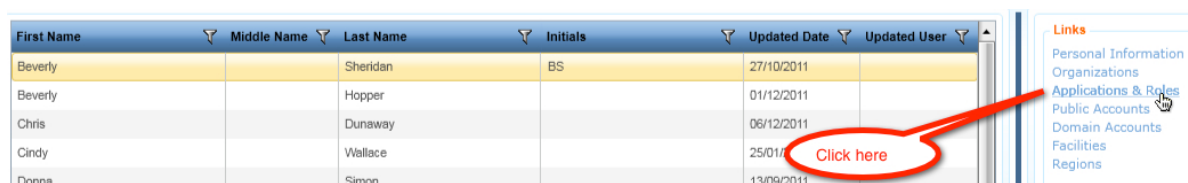

2. Highlight a user and click on "Applications and Roles":

3. In this listing of applications assigned to the user, check first to see that the Security Module is listed:

4. If the Survey module is not listed, click "Associate" and give the user access to the application.

5. If the Survey module is present, highlight it by clicking once on it, and check to the right to see if a role has been checked:

6. If a role hasn't been checked, click the "Survey User" check box and click "Save". This gives the user permission to access the module and respond to any surveys assigned to that user.

7. Return to "Users" and check the next user! This should solve most of the errors about accessing any surveys assigned to the user.